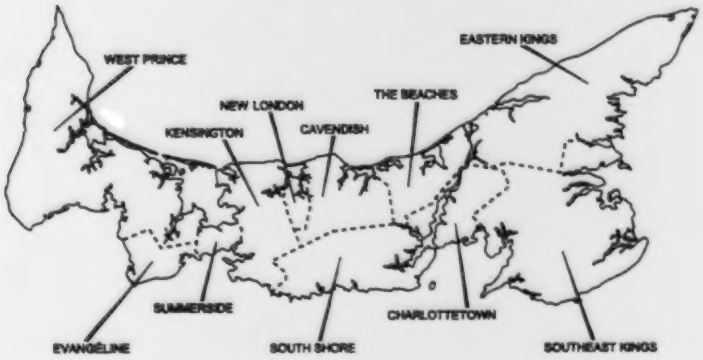
ECONOMIC IMPACT

TOURISM 1999



Prince Edward Island

TOURISM

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Introduction

The Economic Impact: Tourism 1999 report presents an overview of data collected from 1999 Tourism Exit Surveys with business and private motor vehicle and air visitors to Prince Edward Island during the period May 14, 1999 to October 31, 1999. The survey was designed to gather statistical information on visitors to Prince Edward Island with respect to....

- origins of visitors;
- age of visitors;
- party size and composition;
- purpose of visit;
- trip planning process;
- travel motives;
- mode of travel;
- length of stay;
- main overnight destination;
- type of accommodations frequented;
- expenditures by tourism product; and
- visitor activities.

The first section of the Economic Impact: Tourism 1999 report features tables, charts and text highlighting private motor vehicle and air visitations from a provincial perspective. The remainder of report features PEI's business, motorcoach and Japanese visitors and a two-page fact sheet on each one of PEI's regions.

The Economic Impact: Tourism 1999 report presents a small portion of the data available from the 1999 Tourism Exit Survey. Additional data files are available on request to assist tourism operators and associations to conduct their own analysis of the information contained in the SPSS databases. Tourism operators may request specific or customized tables to be generated from the databases. For information and prices, contact the Research Section, Department of Fisheries and Tourism at (902) 368-5907.

TABLE OF CONTENTS

- **An Island Summary** 1
- **Methodology** 6
- **Pleasure PMV & Air: Visitor Profile** 8
- **Pleasure PMV & Air: Visitor Origin Summaries**

  Newfoundland 12

  Nova Scotia 13

  New Brunswick 14

  Quebec 15

  Ontario 16

  Other Canada 17

  New England 18

  Mid Atlantic 19

  Other USA 20

  International 21
- **Business** 22
- **Motorcoach** 25
- **Japanese** 28
- **Tourism Regions** 30

  Beaches, Cavendish, Charlottetown, Eastern Kings, Evangeline, Kensington, New London, Southern Kings, South Shore, Summerside, West Prince

An Island Summary

Economic Impact: Tourism 1999 is the eighth edition of Tourism PEI's annual analysis of visitations, visitor profiles and visitor expenditures covering the May 15th to October 31st tourism period. Each year, travel data is collected through:

- a quantitative follow-up telephone survey of pleasure and business visitors who depart via private motor vehicle or air;
- a quantitative survey of visitors travelling via commercial touring motorcoach using self-completed questionnaires;
- a quantitative survey of Japanese visitors using self-completed questionnaires; and
- traffic counts supplied by Strait Crossing Bridge Ltd., Northumberland Ferries Ltd., Charlottetown Airport Authority Inc., motorcoach and Japanese tour operators, and motorcoach and Japanese accommodation operators.

A process of analysis and synthesis is then applied to the data and summary estimates and descriptive statistics are published as an annual report. More in-depth analyses can be done utilizing the visitation databases, and tourism operators can contact the Research Division of Tourism PEI for more information.

For the period May 15th to October 31st, 1999, it is estimated that 1.27-million pleasure and business visitors spent $302.6-million while vacationing or conducting business in Prince Edward Island. While the number of visitors is down 1.6% over 1998, there was an overall

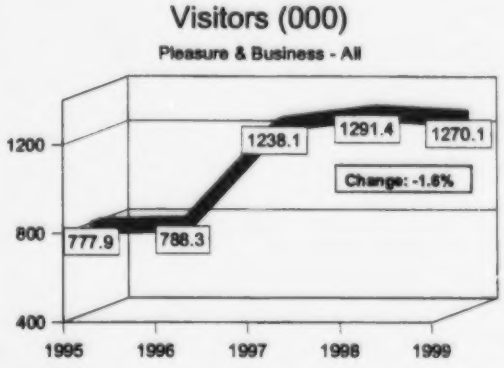
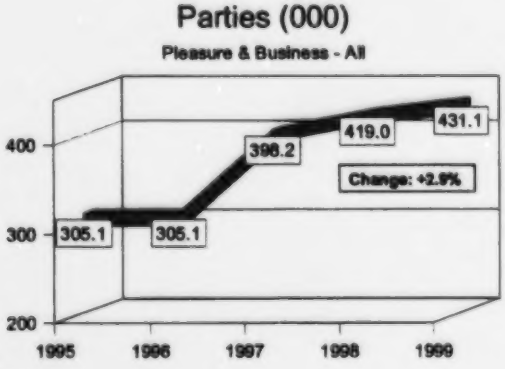


Figure 1



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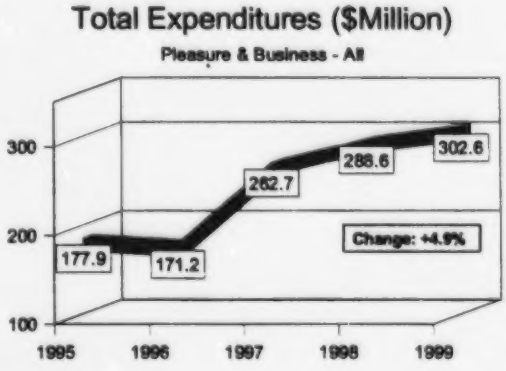
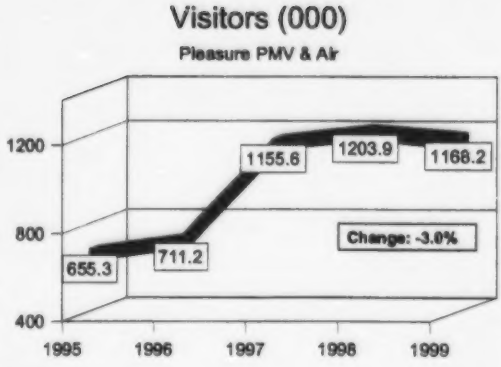


Figure 3

increase of 4.9% in expenditures. This is attributed to slightly more parties in 1999 and a longer average length of stay.

Pleasure private motor vehicle (PMV) and air visitors declined 3.0% while motorcoach visitors increased 9.4% and business visitors increased 21.2%. The business increase is partly due to an improvement in surveying techniques, resulting in more accurate estimates of business or pleasure as the primary travel motivator.



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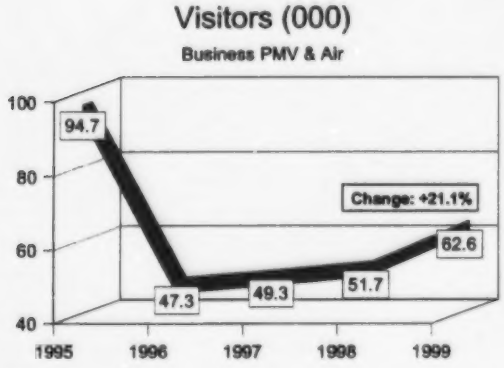

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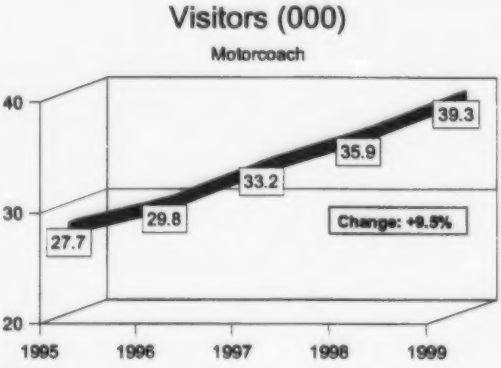

Figure 6

Visitors to Prince Edward Island are profiled in one of nine visitor origin regions:

1. Newfoundland
2. Nova Scotia and New Brunswick
3. Quebec
4. Ontario
5. Other Canada
6. New England region (United States)
7. Mid Atlantic region (United States)
8. Other United States
9. International

Research results from 1999 reflect some significant swings in visitor origin market share between 1997, 1998 and 1999. Due to this, a review of three year trends provides useful insights into possible visitation patterns.

Pleasure visitors travelling via private motor vehicle (PMV) or air accounted for an estimated 92% of all visitors to PEI in 1999. While Nova Scotia and New Brunswick remained PEI's leading visitor origin region, share of market declined to 30.9% of visitors from 34.0% in 1998. Ontario remained the #2 visitor origin region showing continued growth, and there was strong growth from Other Canada. A sharp decline in visitations from Quebec may possibly be attributed to several external factors: more information on this can be found in the Quebec section of this report.

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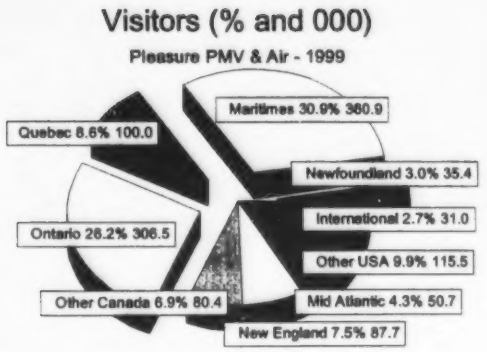

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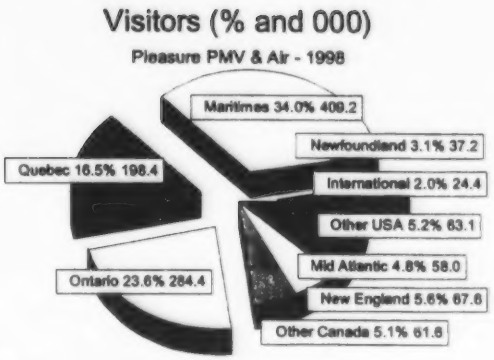


Figure 8

The questionnaire used in the 1999 telephone survey continued with the use of a "main overnight destination" question to identify the primary region where travel parties stayed. These results are summarized in Table 1 below.

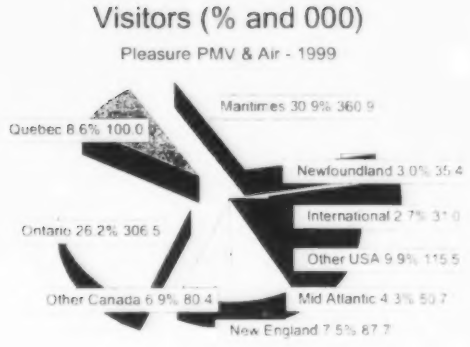
	PMV & Air – "Main Overnight Destination" – Visitors (%)					
	1999 (2)			1998	1997	1996
Tourism Region	Business	Pleasure	Total	Pleasure Only		
Beaches (1)	0.8%	6.3%	5.7%	4.8%	5.0%	6.0%
Charlottetown	54.4%	29.3%	31.9%	29.5%	29.0%	35.0%
Evangeline (1)	0.6%	1.1%	1.0%	1.9%	2.0%	2.0%
New London (1)	0.2%	1.0%	0.8%	1.9%	2.0%	2.0%
South Shore (1)	2.1%	4.6%	4.4%	4.8%	4.0%	2.0%
West Prince (1)	3.3%	3.3%	3.3%	3.8%	5.0%	4.0%

Table 1

Notes:

1. Due to the small number of responses, these regions are sensitive to year-to-year volatility in share of market. In these cases, readers may find the direction of movement over three or four years more meaningful.

2. Does not total 100% due to non-response.



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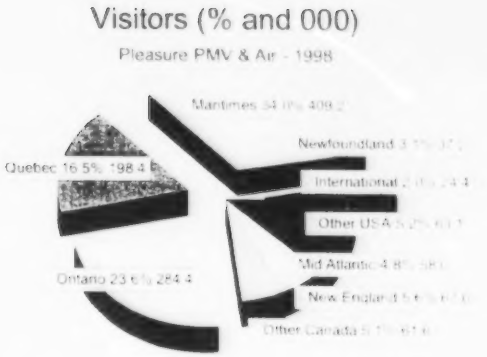

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	1999 (2)			1998	1997	1996
Tourism Region	**Business**	**Pleasure**	**Total**	**Pleasure Only**		
Beaches (1)	0.8%	6.3%	5.7%	4.8%	5.0%	6.0%
Cavendish	5.0%	27.5%	25.2%	26.4%	24.0%	20.0%
Charlottetown	54.4%	29.3%	31.9%	29.5%	29.0%	35.0%
Eastern Kings (1)	2.2%	4.1%	3.9%	3.8%	3.0%	4.0%
Evangeline (1)	0.6%	1.1%	1.0%	1.9%	2.0%	2.0%
Kensington (1)	1.9%	3.3%	3.2%	3.8%	3.0%	4.0%
New London (1)	0.2%	1.0%	0.8%	1.9%	2.0%	2.0%
Southern Kings (1)	4.5%	6.1%	6.0%	4.8%	4.0%	3.0%
South Shore (1)	2.1%	4.6%	4.4%	4.8%	4.0%	2.0%
Summerside	17.8%	8.5%	9.5%	9.5%	11.0%	15.0%
West Prince (1)	3.3%	3.3%	3.3%	3.8%	5.0%	4.0%
Did Not ON (1)	5.8%	2.6%	2.9%	5.0%	8.0%	3.0%

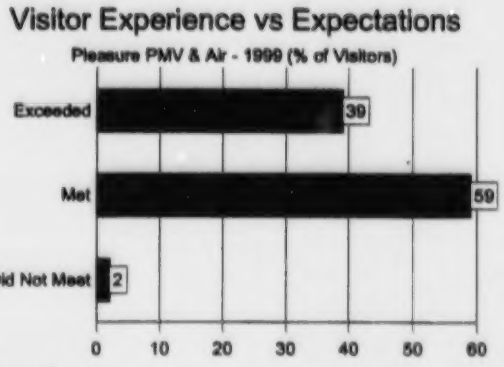
Table 1

Notes:

1. Due to the small number of responses, these regions are sensitive to year-to-year volatility in share of market. In these cases, readers may find the direction of movement over three or four years more meaningful.

2. Does not total 100% due to non-response.

New questions were added to the telephone survey this year to establish a base for measuring visitor satisfaction with their stay in Prince Edward Island. While many factors will have an impact on a visitor's overall experience, a high percentage of visitors reported that they were very satisfied with their stay in Prince Edward Island.



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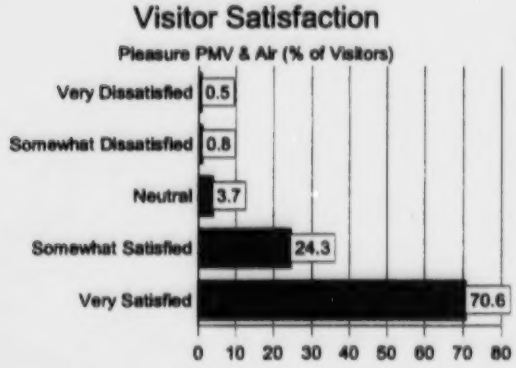

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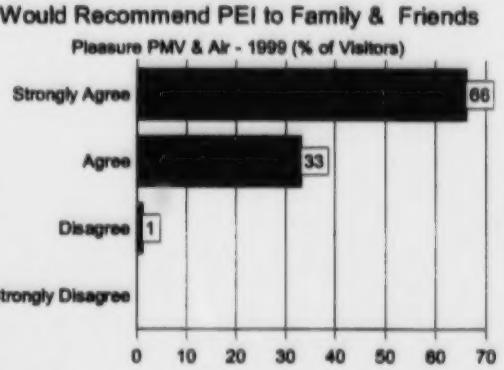

Figure 11

Finally, Table 2 on the next page is a summary of visitations to Prince Edward Island between May 15th and October 31st, 1999. Seventeen cruise ships visiting Charlottetown in 1999 with an estimated 9,025 passengers have not been included in this summary due to a lack of comprehensive research data. However, for estimation purposes, the Atlantic Canada Cruise Association currently uses an expenditure factor of $110 per passenger which reflects port fees and direct spending by both passengers and crew.

Visitation and Expenditure Estimates: May 15 – October 31, 1999										
Segment	% Visitors		Number of Visitors		Mean Travel Party Size		Number of Travel Parties		Total Expenditures ($ Million)	
	1999	1998	1999	1998	1999	1998	1999	1998	1999	1998
Pleasure PMV & Air										
Newfoundland	3.0%	3.1%	35,426	37,192	3.7	3.9	9,575	9,536	$9.3	$12.7
Nova Scotia	20.5%	20.7%	239,596	249,559	3.4	3.4	70,469	73,400	$42.4	$45.4
New Brunswick	10.4%	13.3%	121,330	159,553	3.6	3.5	33,703	45,586	$19.2	$23.2
Quebec	8.6%	16.5%	99,959	198,357	2.9	3.1	34,469	63,986	$24.1	$43.6
Ontario	26.2%	23.6%	306,542	284,421	2.9	3.1	105,704	91,749	$77.1	$69.9
Other Canada	6.9%	5.1%	80,427	61,628	2.8	2.9	28,724	21,251	$19.3	$14.6
New England states	7.5%	5.6%	87,742	67,568	2.9	3.1	30,256	21,796	$24.7	$14.5
Mid Atlantic states	4.3%	4.8%	50,669	58,041	2.7	2.8	18,766	20,729	$14.9	$13.7
Other USA	9.9%	5.2%	115,508	63,103	2.9	3.0	39,831	21,034	$27.5	$12.6
International	2.7%	2.0%	31,022	24,436	2.7	2.8	11,490	8,727	$8.3	$7.0
Motorcoach	3.1%	2.8%	39,262	35,876	2.0	2.3	19,631	15,598	$16.7	$17.2
Total	100%	100%	1,270,124	1,291,434	2.9	3.1	431,091	419,015	$303.7	$288.6

Table 2

Visitation and Expenditure Estimates: May 15 – October 31, 1999										
Segment	% Visitors		Number of Visitors		Mean Travel Party Size		Number of Travel Parties		Total Expenditures ($ Million)	
	1999	1998	1999	1998	1999	1998	1999	1998	1999	1998
Pleasure PMV & Air										
Newfoundland	3.0%	3.1%	35,426	37,192	3.7	3.9	9,575	9,536	$9.3	$12.7
Nova Scotia	20.5%	20.7%	249,596	249,559	3.4	3.4	70,469	73,400	$42.4	$45.4
New Brunswick	10.4%	13.3%	121,330	159,553	3.6	3.5	33,703	45,586	$19.2	$23.2
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International	2.7%	2.0%	31,022	24,436	2.7	2.8	11,490	8,727	$8.3	$7.0
Total Pleasure PMV & Air	92.0%	98.2%	1,168,221	1,203,858	3.1	3.2	382,987	376,206	$266.8	$257.2
Motorcoach	3.1%	2.8%	39,262	35,876	2.0	2.3	19,631	15,598	$16.7	$17.2
Business PMV & Air	4.9%	4.0%	62,641	51,700	2.2	1.9	28,473	27,211	$20.3	$14.2
Total	100%	100%	1,270,124	1,291,434	2.9	3.1	431,091	419,015	$303.7	$288.6

Table 2

Methodology

Tourism PEI's annual visitor and expenditure analysis is based on data collected through:

1) exit point intercepts;
2) follow-up telephone interviews;
3) on-Island motorcoach surveys; and
4) on-Island Japanese surveys.

1. Exit Point Intercepts

From June through September, interviewers were stationed at the ferry, bridge and airport. One airport interviewer was stationed during daytime hours for departing flights. At the ferry, one interviewer was stationed during daytime hours on a 3-day-on, 2-day-off rotation. At the bridge, an attempt was made to station one interviewer during daytime hours seven days a week: a second interviewer was added Friday to Monday during July and August and for anticipated heavy traffic times in the shoulder periods.

At each exit point, interviewers attempted to intercept every fourth departing airport passenger or non-commercial vehicle. When the intercept was made, the interviewer first determined the contact's place of residence. Non-resident contacts were then asked the primary reason for their visit – pleasure or business – and an attempt was made to recruit the contact for a follow-up telephone interview. If the recruitment was successful, the interviewer then collected information required for contacting the individual.

The database of intercepts collected is used to determine resident/non-resident ratios, business/pleasure splits, and visitor origin party market share. In 1999, a total of 20,750 non-resident intercepts were made. From these non-resident intercepts, 13,615 or 65.6% agreed to participate in a follow-up telephone interview.

While the intercept methodology is sound, there are operational limitations:

- the intercept period is restricted to the June to September period;
- intercepts are restricted to daytime hours;
- during severe weather conditions, bridge and ferry intercepts are suspended; and
- due to interviewer safety considerations, the opening or closing of traffic lanes at the bridge results in situations where lanes of traffic may be excluded from interception.

2. Follow-Up Telephone Interviews

Follow-up telephone interviews were conducted from among names randomly selected from the database of intercepts who agreed to be interviewed. North American interviews had a target completion window of 10 days from date of intercept, while attempts were made to complete international interviews within 30 days of intercept.

Interviews were stratified based on season – early shoulder, peak and late shoulder – pleasure/business, and visitor origin market for pleasure. An allocation of the sample to individual strata was done in order to ensure that reliable data was available for each visitor origin market which represents 5% or more of visitors. These markets – Maritimes, Quebec, Ontario, Other Canada, New England, Mid-Atlantic and Other USA – were each allocated a sample of 300. Two smaller visitor origin markets – Newfoundland and International – were each allocated a sample of 150. Business visitors were allocated a sample of 300.

To enhance data collection accuracy, telephone interviews were completed with the use of computer-aided telephone interview (CATI) software, and a 10% verification call-back

process was followed.

In 1999, a total of 2,742 telephone interviews were completed as follows:

Business:		285
Pleasure:	Newfoundland:	137
	Maritimes:	357
	Quebec:	302
	Ontario:	294
	Other Canada:	315
	New England:	328
	Mid Atlantic:	298
	Other USA:	331
	International:	95

3. Motorcoach Surveys

Between June and October, departing motorcoach visitors were intercepted at their hotel/motel and asked to complete a visitor questionnaire: the questionnaire itself was a self-completed document. The accommodations were randomly selected from known motorcoach accommodations in the greater Charlottetown area. Survey days were randomly selected, but the sample was stratified over the shoulder and peak periods. For 1999, 271 motorcoach questionnaires were completed.

In support of the motorcoach visitor survey, a survey of motorcoach accommodation operators was conducted to establish an estimate of the number of motorcoach visitors.

4. Japanese Surveys

Japanese language visitor questionnaires were distributed by Charlottetown-based Prince Edward Tours to their Japanese clients between June and October. These questionnaires were self-completed and 257 questionnaires were completed in 1999. A stratification strategy of surveying by peak and shoulder periods was not successful, with 72% of the questionnaires being completed in June and July.

In support of the Japanese visitor survey, a telephone survey of known Japanese accommodation operators in PEI was conducted to establish an estimate of the total number of Japanese visitors.

Overall traffic data were obtained from the airport, bridge and ferry operating authorities. For the airport and ferry, passenger counts were provided. For the bridge, non-commercial vehicle counts were provided: resident/non-resident splits, visitor origin ratios and average party sizes were then used to establish an estimate of the number of visitors.

Survey data collected were analyzed using spreadsheet software and SPSS and Rayosoft statistical software. The data were proofed and corrected for non-sampling errors, and distributions were screened and adjusted for extreme values where appropriate using standard analytical processes. Both pleasure and business visitor telephone survey data have been weighted by visitor origin for frequency counts and economic impact.

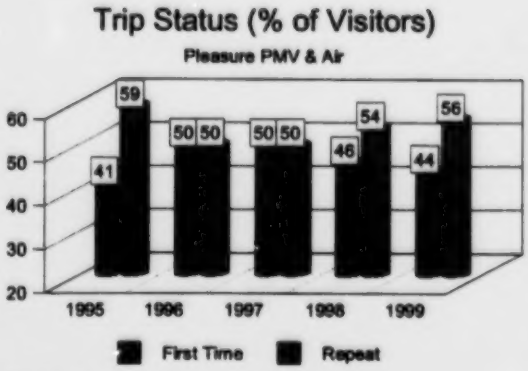
Analysis by tourism region is not published this year. This is due to the historically small sample size and year-to-year inconsistencies associated with "main overnight destination" for most regions: this results in information that is frequently unreliable. However, individual fact sheets for each region will be published for operators who wish to review regional performance based on the sample sizes captured.

Pleasure PMV & Air: Visitor Profile

Pleasure visitors travelling via private motor vehicle (PMV) or air accounted for an estimated 92% of all visitors to PEI in 1999. Research indicates that the split between first time and repeat visitors was similar in 1999 to 1998 (Fig. 12). Trip status splits by visitor origin in 1999 (Fig. 13) were also similar to 1998. Of the repeat visitors, 50% indicated their last visit had been either this year – 1999 – or in 1998 (Fig. 14).

Family vacation (25%), relax and escape (13%), and visiting friends and relatives (15%) were the primary travel motivators in 1999 (Fig. 15). VFR-motivated visitors increased 3% over 1999 with the majority of this increase coming from long haul visitor origin markets.

Survey response indicates that in 1999, most parties overall (45%) planned their trip to Prince Edward Island more than 12 weeks in advance, with 13% planning less than four weeks in advance and 27% planning four to eight weeks in advance (Fig. 16).



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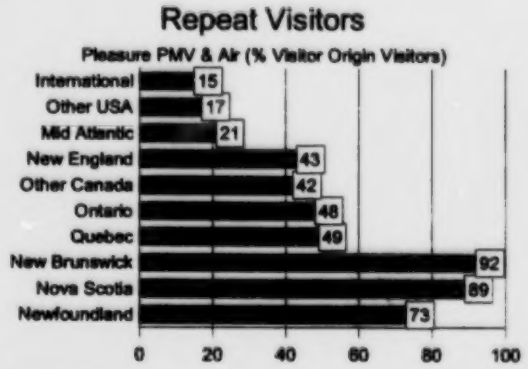

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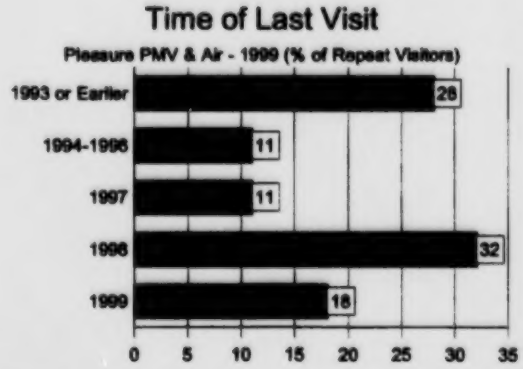

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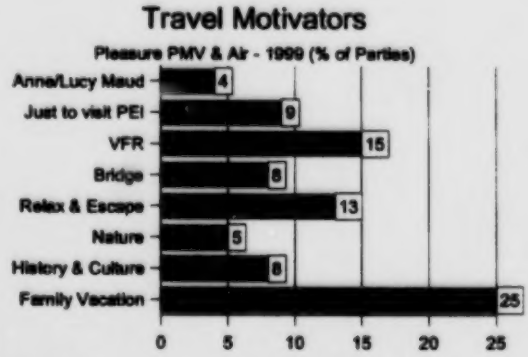


Figure 15

Research indicates that pleasure PMV and air visitors to PEI stayed an average of 4.6 nights in 1999. This is almost a ½-day increase over 1998, and is reflected in 1999's increase in share of trip nights to 42% in 1999 from 33% in 1998. The increase can partly be attributed to a continuing decrease in the number of visitors who did not overnight (3% versus 5%), and an increase in long haul visitor origin share of parties from 49% in 1998 to 61% in 1999.

Adult couples travelling alone or with other couples continued to represent the largest type of pleasure PMV and air travel party to Prince Edward Island. Parties travelling as couples, however, declined from 65% of travel parties in 1998 to 59% in 1999, reflecting an increase in parties travelling as families, and a slight increase in single person parties (Fig. 17). Overall average party size declined slightly to 3.1 persons from 3.2 persons in 1998 (Fig. 18).

Results from 1999 indicate that the share of visitors represented by older, aged 60+ persons continues to decline, with growth coming in the under 40 age group. Visitors aged 40 to 59 declined slightly in 1999, but the overall trend is still up for this segment (Fig 19).

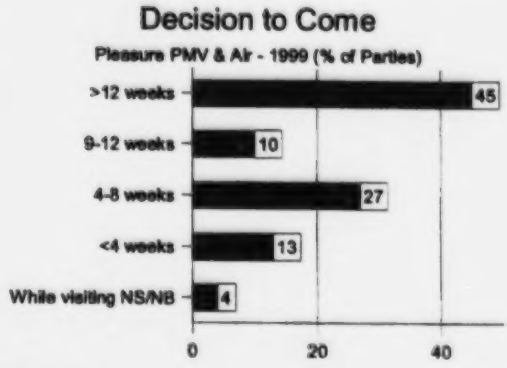


Figure 16

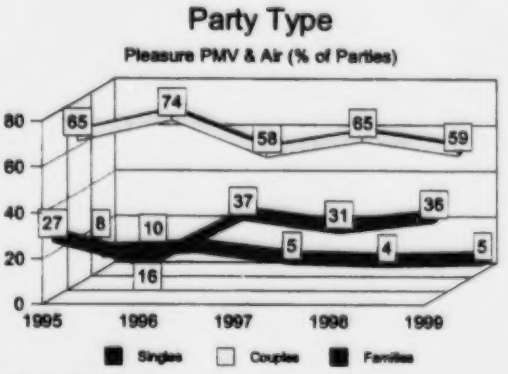


Figure 17

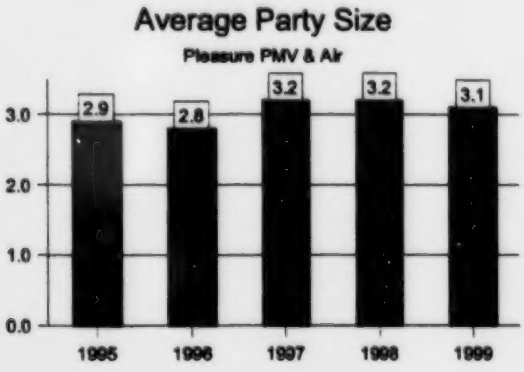


Figure 18

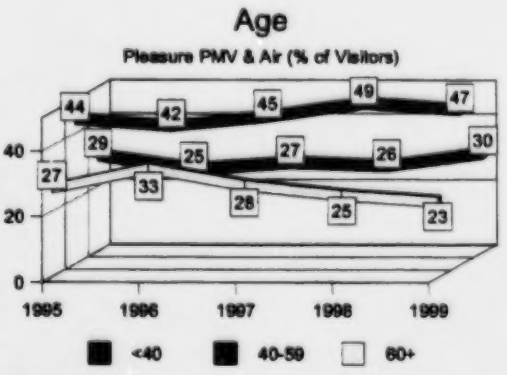


Figure 19

Research results from 1999 indicate some decline in both parties represented by higher family incomes – >$50,000 – and in visitors employed full-time (Fig. 20 and Fig. 21). Visitor share held by retired persons changed little in 1999, while there was a 4% increase in "Other," including part-time, homemakers and stay-at-homes, students and unemployed.

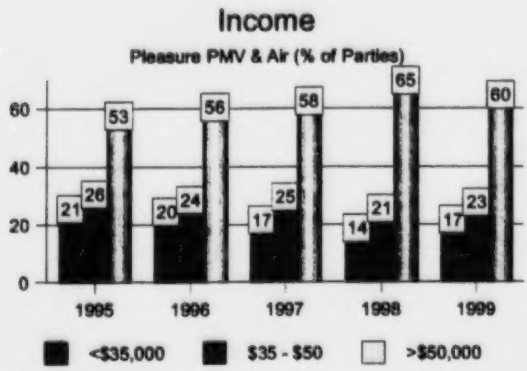


Figure 20

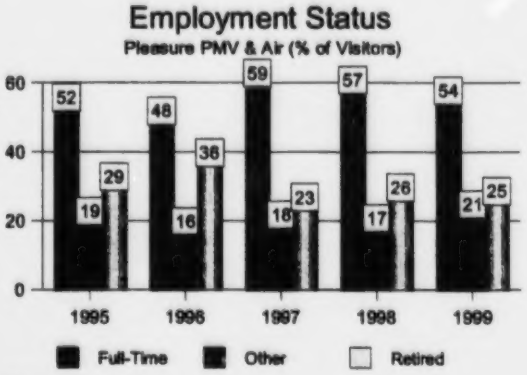


Figure 21

The 1999 survey of pleasure PMV and air visitors indicates that hotels, motels and resorts continued to be the most popular type of accommodation (Fig. 22). A direct comparison with historical data is difficult in that Figure 22 is stated as parties as opposed to visitors, and is weighted to reflect the entire market, including visitors who did not overnight. For 1999, non-paid accommodations or VFRs increased in line with the overall increase in VFR-motivated travel.

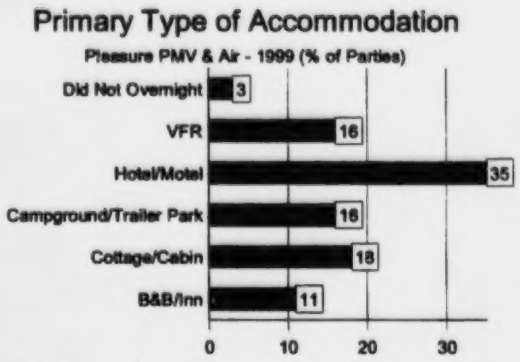


Figure 22

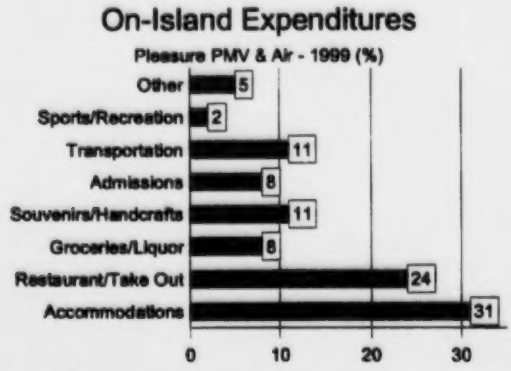


Figure 23

In 1999, pleasure PMV and air visitors spent an estimated $266.8-million, up 3.7% over 1998. Accommodations (31%) and restaurant/take-out meals (24%) accounted for more than half of an average party's total expenditures on-Island (Fig. 23). Transportation and souvenirs/crafts at 11% each, admissions and groceries/liquor at 8% each, sports/recreation (2%) and other (5%) accounted for the balance.

While visiting Prince Edward Island, sightseeing (81%), craft shopping (73%), beach visits (72%), visiting PEI's National Park (52%), and general merchandise shopping (53%) were the top five activities in 1999.

A significant increase from 16% to 45% was recorded for soft outdoor adventure. These activities included: bird watching (19%); boating (10%); Confederation Trail (15%); cycling (7%); fishing (5%); and hiking (20%). The continued growth in Festivals/Events from 17% to 24% was notable.

Interest in Anne and/or Lucy Maud Montgomery attractions remained high at 43% as did history and cultural attractions at 44%. A summary of visitor activities is shown in the Table 3 below.

	Pleasure PMV & Air – Visitor Activities				
	1995	1996	1997	1998	1999
Acadian Culture	16%	19%	28%	20%	29%
Anne/Lucy Maud	39%	40%	47%	50%	43%
Beach Visits	57%	45%	69%	74%	72%
Camping	13%	8%	20%	20%	19%
Craft Shopping	68%	44%	77%	85%	73%
Festivals/Events	9%	4%	13%	17%	24%
Fun/Theme Parks	13%	16%	19%	26%	24%
Golf	10%	11%	12%	12%	13%
History/Culture	52%	45%	46%	47%	44%
Live Theatre	17%	16%	15%	13%	18%
Lobster Suppers	35%	34%	46%	48%	45%
National Park	48%	43%	43%	69%	52%
Soft Outdoor Adventure(1)	12%	16%	20%	16%	45%
Sightseeing/Tours	88%	81%	88%	93%	81%
General Shopping	60%	18%	44%	52%	53%

Table 3

Notes: 1. Includes bird watching, boating, Confederation Trail, cycling, fishing, and hiking.

Newfoundland

Some settling in pleasure PMV and air visitations from Newfoundland to Prince Edward Island was experienced in 1999. While total visitations declined 4.8%, a greater impact was the estimated 26.8% decline in expenditures, attributed to a slightly smaller average party size (3.7 versus 3.9) and a shorter average length of stay (5.5 nights versus 5.9 nights).

Repeat visitors (73%) continued to account for the majority of visitors from Newfoundland. A family vacation (40%) continued to be the primary trip motivator for Newfoundlanders in 1999, followed by the Confederation Bridge (12%), VFR (10%), and relax and escape (10%). An estimated 50% of decisions to visit PEI were made within eight weeks of departure. Overall, PEI captured a 48% share of trip nights in 1999 versus 49% in 1998.

Visitors from Newfoundland continued to be family oriented with an estimated 59% of visitors travelling as families. In 1999, persons under the age of 50 accounted for 69% of visitors from Newfoundland, down from 77% in 1998.

An estimated 47% of the parties from Newfoundland in 1999 claimed Cavendish as their "main overnight destination," followed by Charlottetown at 18%. The primary type of accommodations for these parties were cabins/cottages (34%), hotel/motel (31%), and non-paid (15%). An estimated 2% of parties from Newfoundland did not overnight in 1999.

While in PEI, visitors from Newfoundland were actively involved in beach visits (75%), fun/theme parks (58%), and Anne attractions (56%).

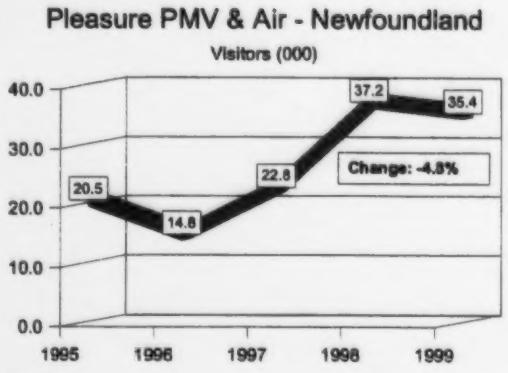


Figure 24

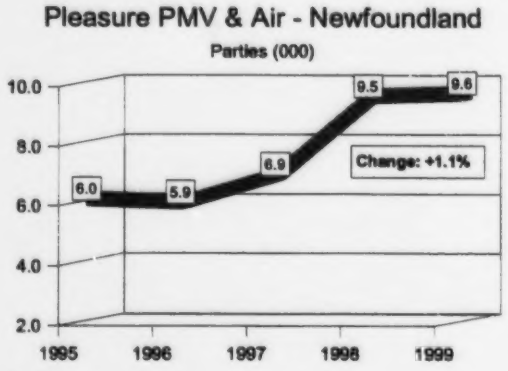


Figure 25

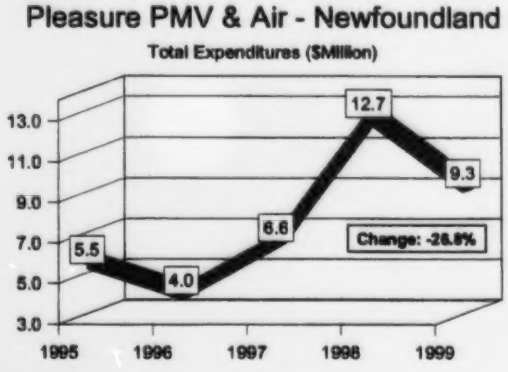


Figure 26

Nova Scotia

While visitations declined 4%, the almost 240,000 visitors from Nova Scotia in 1999 compared to 96,300 in the last year before the bridge (1996) is dramatic. The slight decline in expenditures in 1999 is attributed to fewer parties. Average party size (3.4) and length of stay (3.7) in 1999 are similar to 1998.

With an 89% share of visitors from Nova Scotia, repeat visitors are significant. A family vacation (29%) was the strongest trip motivator, followed closely by VFR (24%), and then by relax and escape (17%). PEI captured an 86% share of trip nights and decision to come was short, with 57% of decisions being made less than seven weeks from departure.

Nova Scotians travelling as families accounted for an estimated 47% of Nova Scotian visitors in 1999. With respect to age, the Nova Scotian visitor is younger with 42% under the age of 40 and 73% under the age of 50.

An estimated 29% of the pleasure parties from Nova Scotia claimed Cavendish as their "main overnight destination" in 1999, followed by Charlottetown (28%), Summerside (11%), Southern Kings (8%) and Beaches (8%). An estimated 2.4% of Nova Scotian parties did not overnight. Primary types of accommodation were cabin/cottage (23%), hotel/motel (32%) and non-paid (27%).

Nova Scotians are more active with 33% claiming to have experienced soft outdoor adventure and 45% having visited PEI's National Park. Other activities included: beach visits (59%); festivals/events (23%); fun/theme parks (38%); and nightlife (14%).

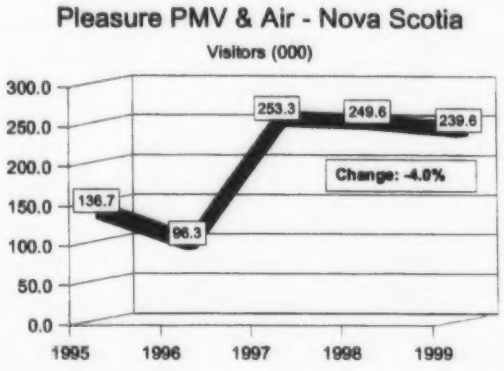
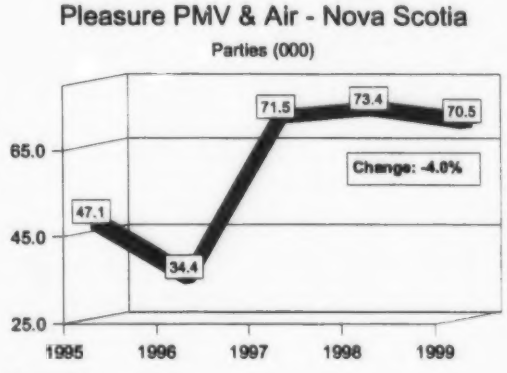


Figure 27



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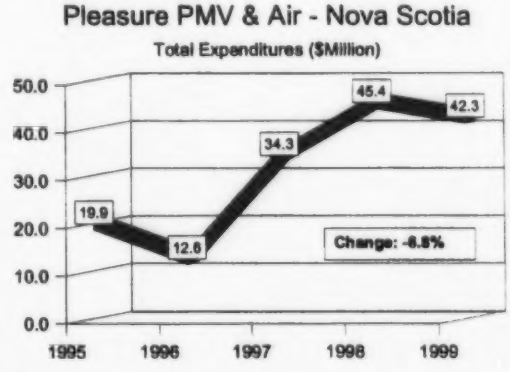


Figure 29

New Brunswick

Prince Edward Island experienced a decline in visitations from New Brunswick for the second year in a row. No external factors are obvious, and the change may be a reflection of a settling in the marketplace since the Confederation Bridge opened.

As with the other Atlantic provinces, there are a significant number of repeat visitors from New Brunswick (92%), with 63% having last visited in either 1999 or 1998. While family vacation (24%), relax and escape (20%) and VFR (16%) were the key primary trip motivators, it is notable that 11% were primarily motivated by the bridge. Average party size (3.6) and average length of stay (3.7 nights) were comparable to 1998, and PEI captured an 85% share of trip nights.

New Brunswick remains a strong family market (41% of visitors), and 43% of visitors were under the age of 40 with 64% being under the age of 50.

An estimated 5.6% of the parties from New Brunswick did not overnight in 1999. For those who did, Cavendish (37%), Charlottetown (24%), Summerside, (7.4%), Kensington (7%), and Beaches (6%) were the most popular "main overnight destinations." Cabin/cottage (23%) and hotel/motel (33%) were the most popular types of accommodation, followed by camping (19%) and non-paid (16%).

Camping (22.7%), PEI's National Park (42%), fun/theme parks (37%), festivals/events (19%) and live theatre (15%) were popular activities in addition to strong participation in the mainstream beach visits, sightseeing, and shopping activities.

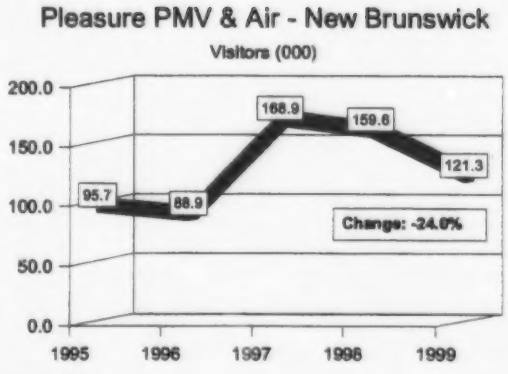


Figure 30

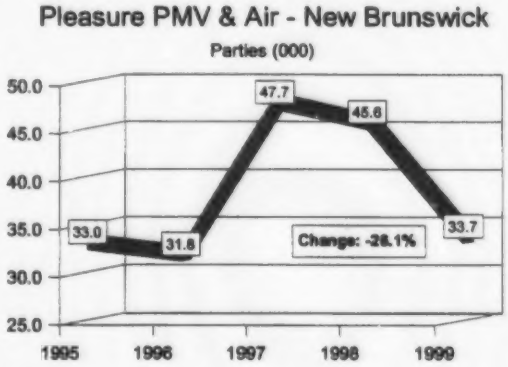


Figure 31

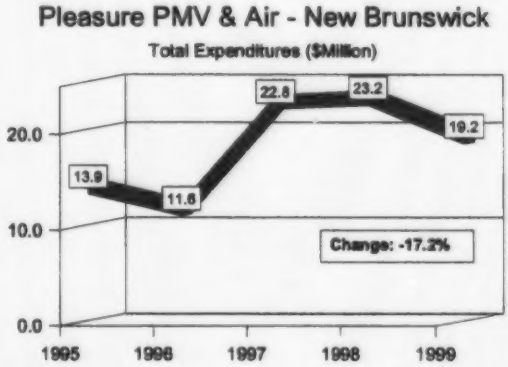


Figure 32

Quebec

Despite a sharp correction in visitations, 1999's 100,000 visitors from Quebec represent a 25% increase over 1997 when the bridge opened. Possible explanations for the reduction in visitors include: a) a return to traditional U.S. vacation patterns as Quebecers adapt to U.S. exchange rates; b) a stay-at-home tourism campaign by the province of Quebec; and c) increased travel promotion against Quebecers by traditional U.S. destinations.

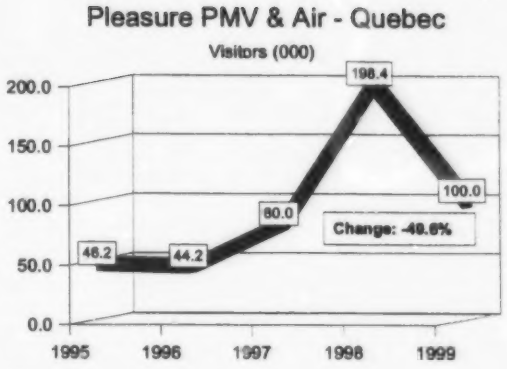


Figure 33

In 1999, average party size among visitors from Quebec was slightly smaller (2.9 versus 3.1), while average length of stay was comparable. PEI's share of trip nights among Quebecers was 40%, with an estimated 6% of parties not overnighting. While the decision to come was more than 12 weeks for 44% of the parties, it is notable that 12% made their decision while visiting Nova Scotia or New Brunswick.

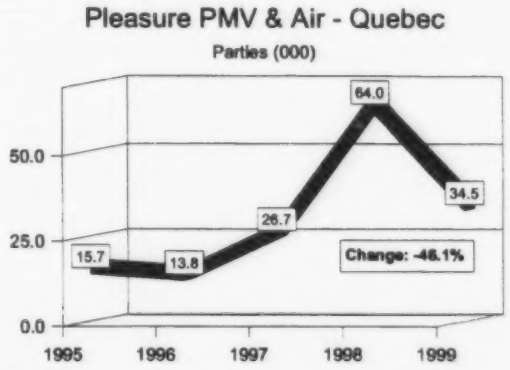


Figure 34

Quebec visitors in 1999 mainly travelled as adult couples (67%), with an estimated 48% of visitors being aged 50+. The Confederation Bridge (16%) was a strong trip motivator, along with family vacation (19%), relax and escape (15%), nature (13%), and "just to visit PEI" (9%).

Cavendish (38%) and Charlottetown (21%) were key "main overnight destinations" for parties from Quebec, followed by Eastern Kings and Beaches at 6% each. Camping (36%) was the most popular type of accommodation, followed by hotel/motel (26%) and cabin/cottage (13%).

Beach visits (81%), PEI's National Park (58%), soft outdoor adventure (63%), historical/cultural attractions (45%) and guided tours (32%) were notable activities in addition to the popular sightseeing and shopping.

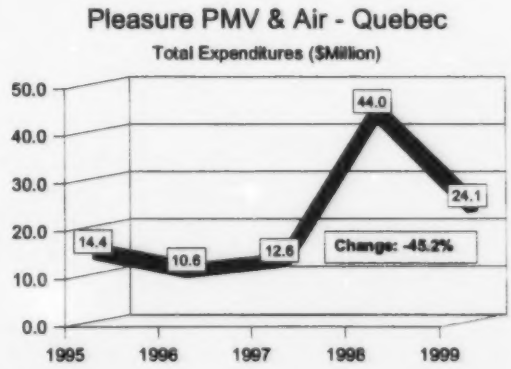


Figure 35

Ontario

Visitations from Ontario recovered from a slight dip last year and posted a 7.8% gain. A smaller party size (2.9 versus 3.1) and a longer average length of stay (5.3 nights versus 4.8 nights) contributed to more parties from Ontario and a 10.3% increase in expenditures.

PEI benefited from a 48% level of repeat visitors. In 1999, 33% of visitors from Ontario had last visited in 1998. Family vacation (29%) was the most significant travel motivator, followed by VFR (14%), relax and escape (11%), "just to visit PEI" (9%), and history and culture (8%). Overall, PEI captured a 44% share of trip nights in 1999 among visitors from Ontario.

Pleasure PMV and air visitors from Ontario travelled primarily as adult couples in 1999 (64%), and tended to be an older market with 48% of visitors aged 50+. While 49% of visitors travelling from Ontario decided more than 12 weeks in advance, 26% decided between four and eight weeks prior to travelling.

Cavendish (23%) and Charlottetown (30%) were the primary "main overnight destinations," followed by Summerside (9%), Southern Kings (8%), West Prince (6%), and Beaches (6%). Hotel/motel (31%) and cabin/cottage (22%) were the most popular types of accommodation, but B&B/Inn was strong at 12%. Non-paid accommodation accounted for 16% of parties from Ontario.

Soft outdoor adventure (47%), Acadian culture (35%), beach visits (76%), festivals/events (32%), live theatre (21%), Anne attractions (55%) and historical/cultural attractions (53%) were all popular activities with visitors in 1999.

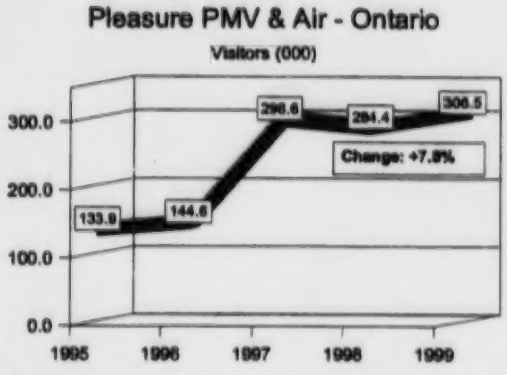
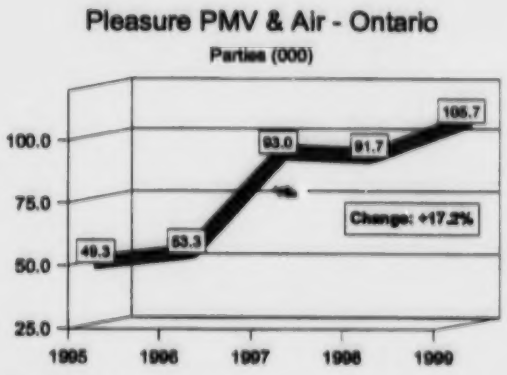


Figure 36



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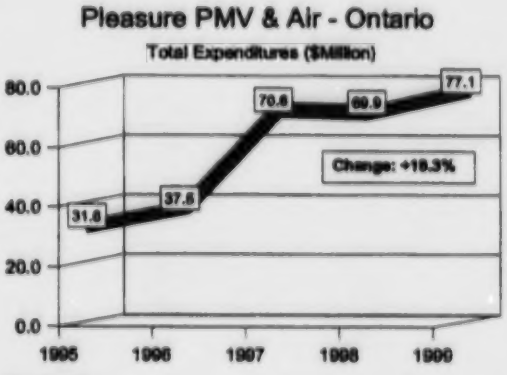

Figure 38

Other Canada

Visitations from "Other Canada" rebounded in 1999 and continued a growth trend dating back to pre-bridge 1995 and 1996. Average party size was comparable with last year (2.8 versus 2.9), but average length of stay increased to 5.5 nights from 4.7 nights. In 1999, PEI captured a 28% share of trip nights, with only .5% of parties claiming to have not overnighted.

Visitors from "Other Canada" were primarily travelling as adult couples (56%), with 30% travelling as families, and 7% as single travellers. Among 1999's visitors, it is estimated that 54% were under the age of 50. Fifty-eight percent of visitors were first time.

At 18% of visitors, a family vacation ranked among the lowest of all the visitor origin regions as a primary travel motivator. History and culture was a strong motivator at 13%, as was "just to see PEI" at 15% and VFR at 18%.

An estimated 36% of parties from "Other Canada" in 1999 claimed Charlottetown as their "main overnight destination," followed by Cavendish (24%), Summerside (9%), Southern Kings (5%) and Beaches (5%). With 41% of parties, hotels and motels were the most popular type of accommodation followed by non-paid (18%), B&B/Inn (17%) and cabin/cottage (11%).

While in PEI, visitors from "Other Canada" were actively involved in beach visits (79%), soft outdoor adventure (50%), historical and cultural attractions (60%), live theatre (24%), festivals/events (28%), and Acadian culture (38%).

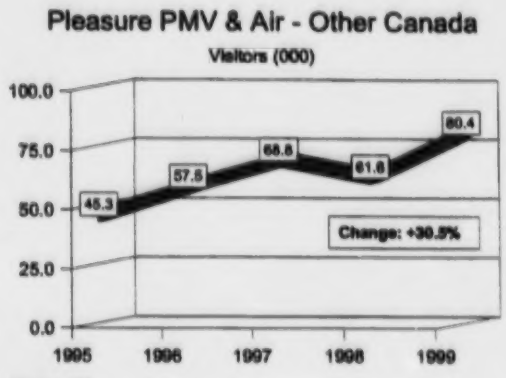

Figure 39

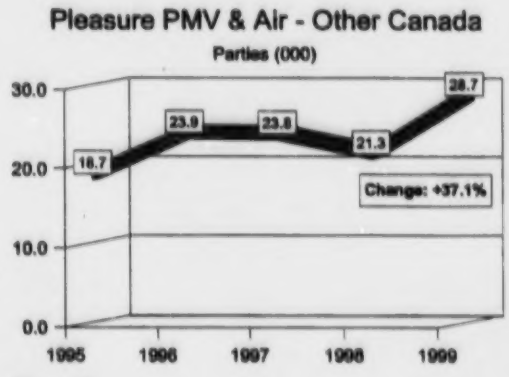

Figure 40

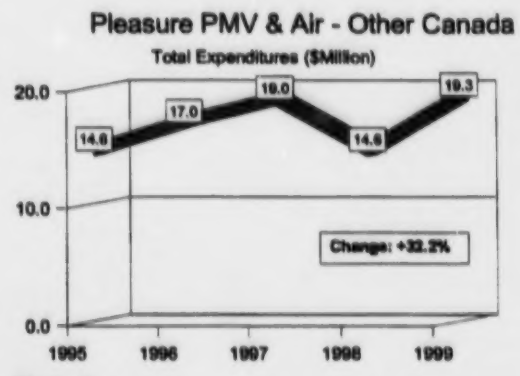

Figure 41

New England

New England is another visitor origin market that has produced consistent growth over the past several years. While a significant increase was posted in 1999 over a decline in 1998, the 5-year trend shows steady growth. It is notable that estimated expenditures in 1999 were less than 2% higher than 1997 when there were almost 17% more visitors. For 1999, average party size is down slightly over 1998 (2.9 versus 3.1), while average length of stay is up slightly (4.7 nights versus 4.5 nights). PEI captured a 53% share of trips nights, and it is estimated that 2.6% of New England parties did not overnight in 1999.

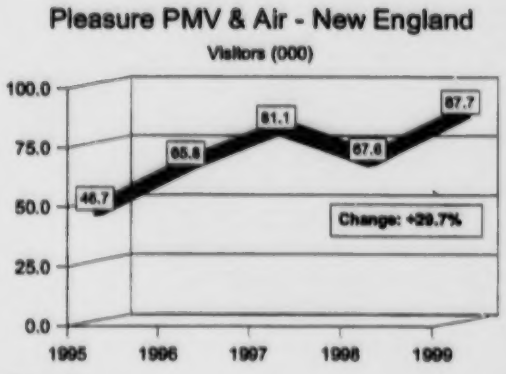

Figure 42

Family vacation (23%), "just to see PEI" (13%), relax and escape (19%) and VFR (12%) were key travel motivators in 1999. While more than half (52%) of New England visitors made their decision to come more than 12 weeks in advance of travel, 27% made their decision between four and eight weeks, and 5% decided while visiting New Brunswick or Nova Scotia.

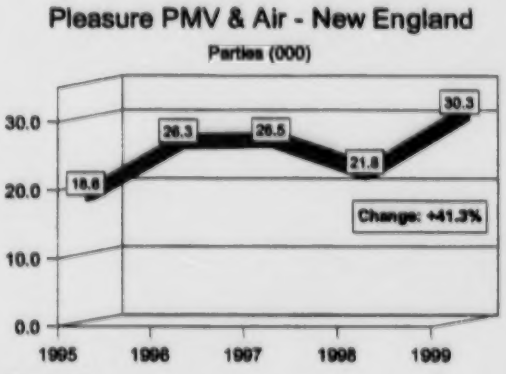

Figure 43

Charlottetown (36%), Cavendish (24%) and Summerside (9%) were the "main overnight destinations" in 1999 for parties from New England. With respect to type of accommodation, hotel/motel (41%) was the most popular followed by cabin/cottage (14%), B&B/Inn (14%) and camping (16%).

Soft outdoor adventure was popular with visitors from New England in 1999 (52%). Other activities included Acadian culture (37%), festivals/events (21%), historical/cultural attractions (43%), Anne attractions (47%), and PEI's National Park (56%).

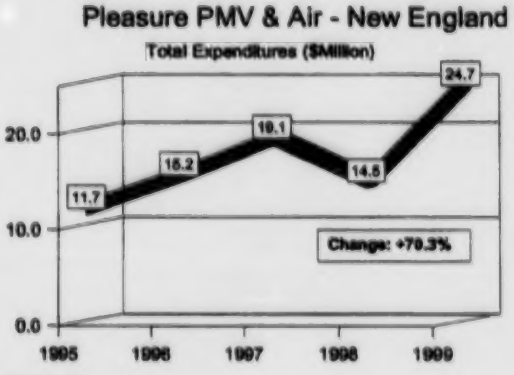

Figure 44

Mid Atlantic

Visitations from the "Mid Atlantic" United States slipped in 1999, possibly as a result of Atlantic Canada promotion in the region in 1998. While the number of parties declined as well, a longer average length of stay (4.3 nights versus 3.9) and a 20% increase in average party expenditures resulted in an increase in total expenditures over 1998.

In 1999, PEI captured a 35% share of trip nights among visitors from the "Mid Atlantic."

At 79% of visitors, "Mid Atlantic" had the third highest level of first time visitors to Prince Edward Island among visitor origin markets. In 1999, the 22% of visitors who were motivated by a family vacation were balanced by "just to see PEI" (17%), history and culture (11%), relax and escape (12%), and Anne/Lucy Maud (10%). "Mid Atlantic" visitors travelled primarily as couples (69%), and they were also an older market with 63% being aged 50+.

At 44% of parties, Charlottetown dominated as the "main overnight destination," followed by Cavendish (22%) and Beaches (9%). An estimated 1.7% of "Mid Atlantic" parties did not overnight in 1999.

Of those who did overnight, B&B/Inn was very popular with parties (25%) along with hotel/motel (48%) and cabin/cottage (11%).

While beach visits (69%) were not quite as popular with "Mid Atlantic" visitors, soft outdoor adventure (53%) scored high as did historical/cultural attractions (59%), Anne attractions (62%), Acadian culture (42%), lobster suppers (55%), and PEI's National Park (63%).

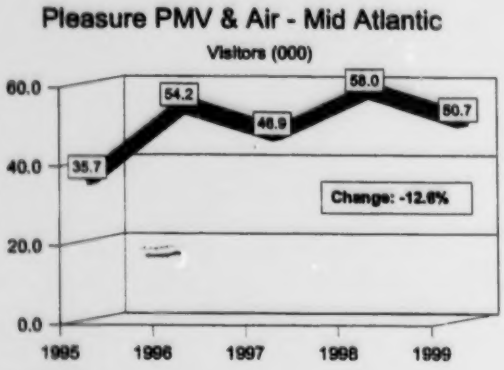

Figure 45

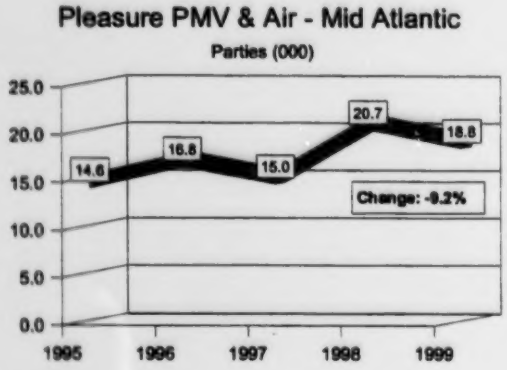

Figure 46

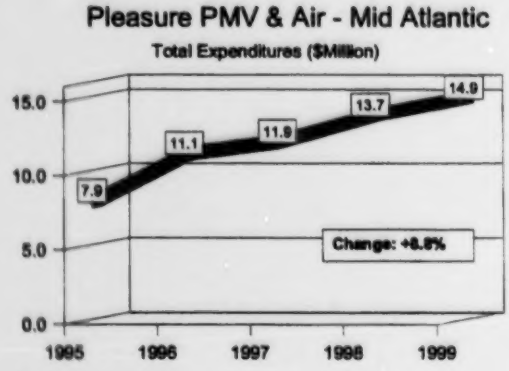

Figure 47

Other USA

Between 1997 and 1999, a large swing has been experienced in visitations from the "Other USA" visitor origin region. Considering the vast area of the United States that "Other USA" covers and the challenge of cost effectively promoting to this region, there is no obvious reason for the pattern. Of particular note is the fact that despite the increase in 1999 and the impact of the bridge, the number of visitors from "Other USA" is still less than the 117,600 visitors reported in pre-bridge 1996.

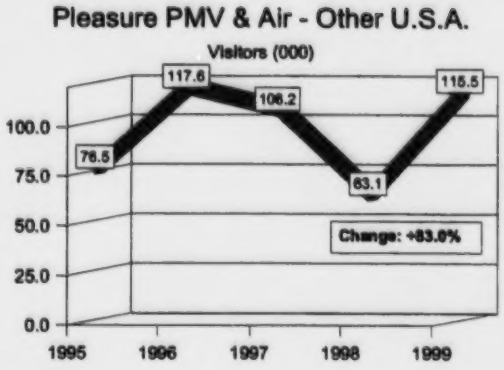

Figure 48

In 1999, average party size was comparable to 1998 (2.9 versus 3.0), but there was a notable increase in average length of stay (4.5 nights versus 3.4 nights). Overall, PEI captured a 29% share of trip nights from these visitors.

Pleasure PMV and air visitors from "Other USA" are the oldest visitor origin market with 66% being aged 50+ and 38% being retired. Not surprisingly, 62% travelled as couples. In the "Other USA" group, 83% were first time visitors with "just to see PEI" (19%), Anne/Lucy Maud (13%), history and culture (16%) and family vacation (17%) being the key primary travel motivators.

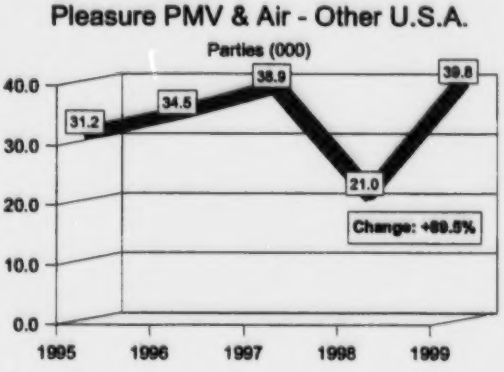

Figure 49

Among the "Other USA" parties, Charlottetown (39%) was the most popular "main overnight destination," followed by Cavendish (19%) and Beaches (7%). Next to hotel/motel (44%), B&B/Inn (23%) and cabin/cottage (11%) were the most popular types of accommodation.

In line with travel motivators, soft outdoor adventure (55%), Acadian culture (40%), live theatre (23%), Anne attractions (63%) and historical/cultural attractions (57%) were popular visitor activities.

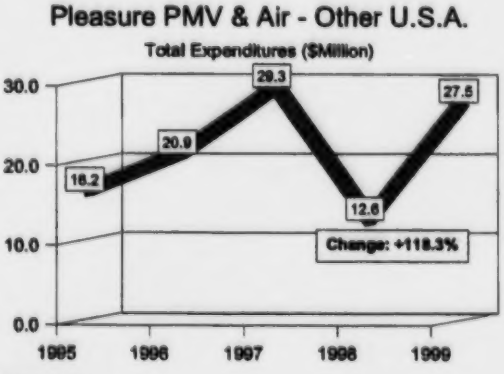

Figure 50

International

The "International" visitor origin market is all geographic areas outside of North America. In 1999, it is estimated that "International" visitors increased to 31,022, of which approximately 20% are estimated to have been Japanese.

Among "International" visitors, average party size was comparable with 1998 (2.7 versus 2.8), but a significant increase in average length of stay from 4.4 nights to 5.5 nights was experienced. In 1999, PEI trip nights represented 19% of total trip nights.

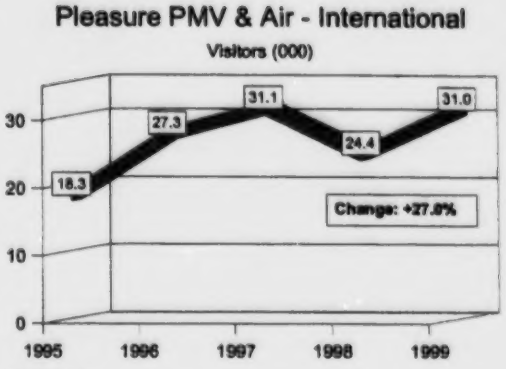

Figure 51

Despite the increased length of stay in PEI, average party expenditures declined 10%. This can partly be attributed to the 20% who stayed in low cost accommodations such as campgrounds and hostels, and the 7% who stayed in non-paid accommodations.

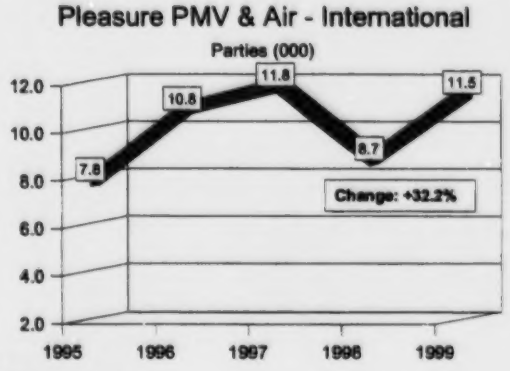

Figure 52

Eighty-five (85) percent of "International" visitors in 1999 were first time, with family vacation (21%), Anne/Lucy Maud and VFR (16% each) and relax and escape (13%) being strong travel motivators. Couples represented 56% of visitors, and reflected a younger traveller with 57% being under the age of 50.

The popularity of low cost/no cost accommodations was mentioned above. Hotel/motel (33%) and B&B/Inn (21%) were also popular. The three most popular "main overnight destinations" were Charlottetown (37%), Cavendish (19%) and Eastern Kings (8%).

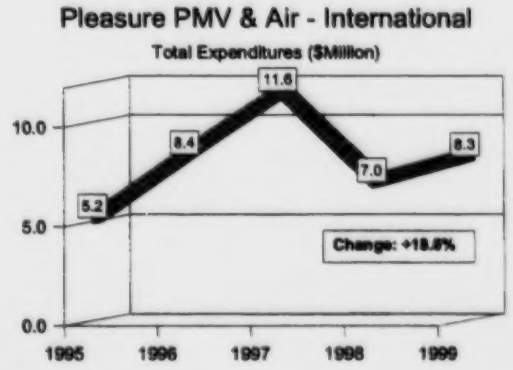

Figure 53

While visiting PEI, beach visits (84%), lobster suppers (51%), soft outdoor adventure (64%), Anne attractions (57%), PEI's National Park (71%) and festivals/events (21%) were popular activities.

Business

Prince Edward Island benefited from a strong increase in business travel during the May 15th to October 31st period in 1999. Overall, it is estimated that business visitations increased 21.1% to 62,641 (Fig. 54), resulting in a 35.2% increase in business visitor-based expenditures to $19.2-million (Fig. 58).

Much of this expenditure increase can be attributed to an increase in 1999 in business visitors from outside the Maritimes (Fig. 55), and a higher average party expenditure generated by these out-of-region visitors (Fig. 56).

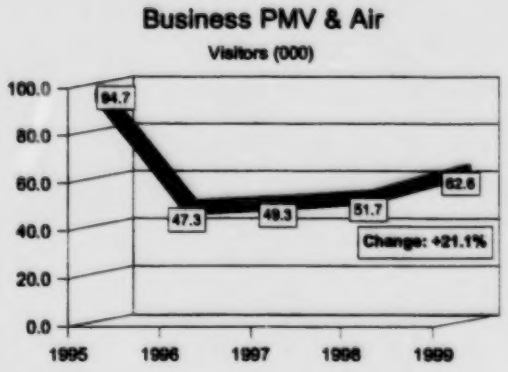

Figure 54

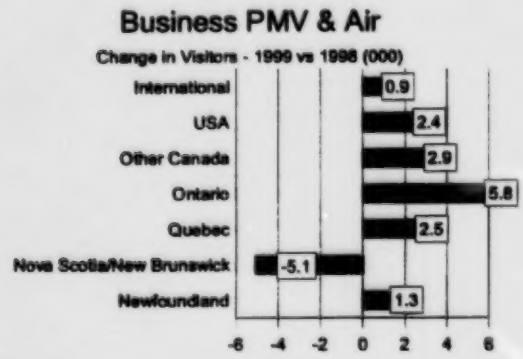

Figure 55

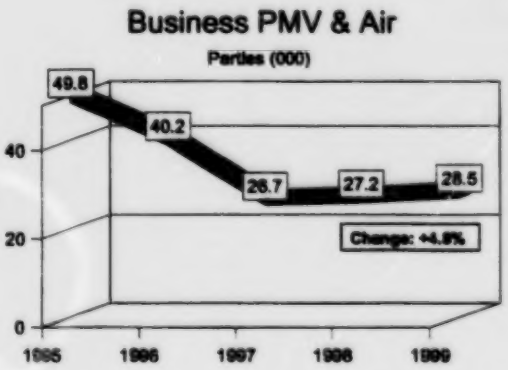

Figure 57

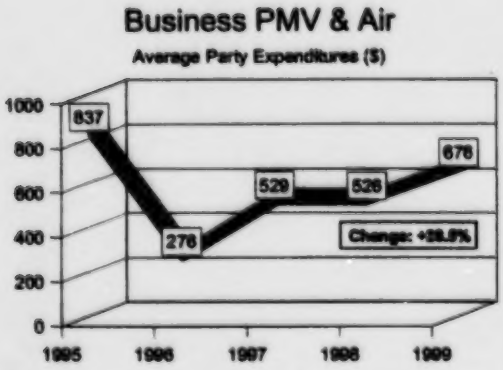

Figure 56

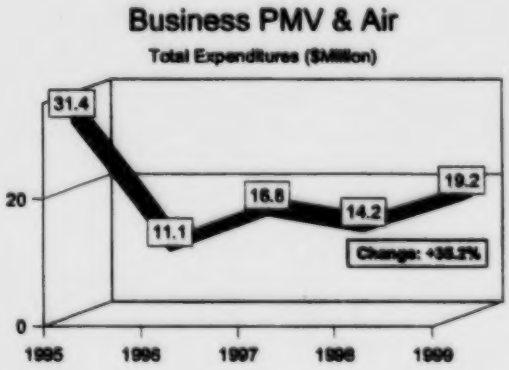

Figure 58

Also contributing to higher party expenditures were a slightly higher average party size (2.2 versus 1.9) and a longer length of stay (4.5 nights versus 3.4 nights) (Fig. 59). The longer length of stay can partly be attributed to more business visitors who overnighted (94% in 1999 versus 79% in 1998).

In 1999, the percentage of first time business visitors to PEI increased to 22% from 9%. In support of other findings, an increase of this nature is indicative of stronger out-of-region growth.

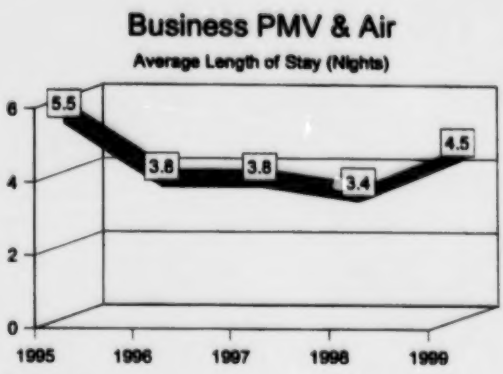

Figure 59

There were some notable shifts in the reasons for a business trip to Prince Edward Island in 1999. Most notable is the increase in business visitors who reported that their primary reason for visiting was to attend a convention (Fig. 60 and Fig. 61).

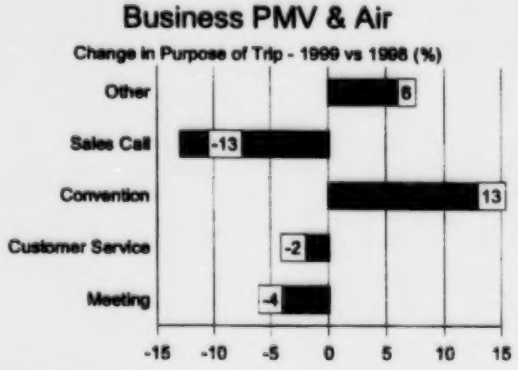

Figure 60

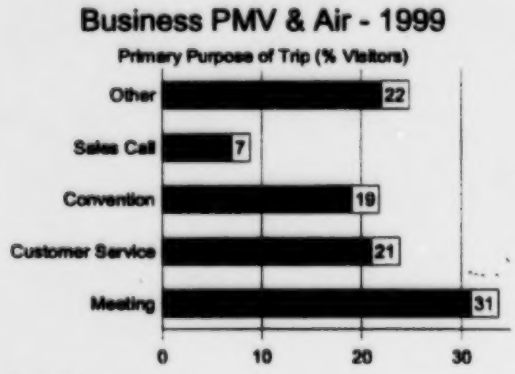

Figure 61

Of those who overnighted, more than half (53%) reported that Charlottetown was their "main overnight destination," while 17% reported Summerside. With a 68% share of overnighting business visitors, hotels and motels were the most popular type of accommodation.

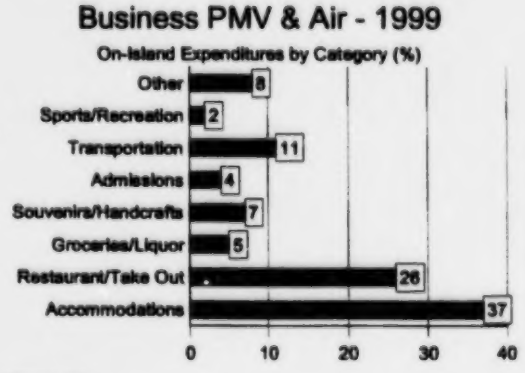

Figure 62

Figure 62 illustrates spending patterns for

M121

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business visitors while staying in PEI in 1999. Of note is the decline in restaurant/take-out meals as a percentage of expenditures to 26% from the mid-30s. This decline may be reflected in the increase in accommodations to 37% of expenditures and the possibility of a higher number of meals in hotel/motel costs.

Table 4 below summarizes primary demographics for business visitors to PEI in 1999.

	Business Visitor Demographics				
	1995	1996	1997	1998	1999
Gender					
Male	74%	77%	63%	75%	64%
Female	26%	23%	37%	25%	36%
Income					
<$50,000	39%	43&	39%	31%	35%
$50,000+	61%	57%	61%	69%	65%

Table 4

business visitors while staying in PEI in 1999. Of note is the decline in restaurant/take-out meals as a percentage of expenditures to 26% from the mid 30s. This decline may be reflected in the increase in accommodations to 37% of expenditures and the possibility of a higher number of meals in hotel/motel costs.

Table 4 below summarizes primary demographics for business visitors to PEI in 1999.

	Business Visitor Demographics				
	1995	1996	1997	1998	1999
Gender					
Male	74%	77%	63%	75%	64%
Female	26%	23%	37%	25%	36%
Age					
<40	39%	47%	39%	37%	38%
40+	61%	53%	61%	63%	62%
Income					
<$50,000	39%	43&	39%	31%	35%
$50,000+	61%	57%	61%	69%	65%
Trip Status					
First Time	19%	10%	26%	9%	22%
Repeat	81%	90%	74%	91%	78%

Table 4

Motorcoach

The 1999 motorcoach survey consisted of self-completed questionnaires by motorcoach visitors while visiting Prince Edward Island. This data was supported with a survey of PEI accommodations operators known to host motorcoaches.

Overall, growth in motorcoach visitations to PEI continued to an estimated 39,262 visitors in 1999. This is a 9.5% increase over 1998 (Fig. 63). Strong growth continued from New England visitors (+28%) and there was a notable increase in Ontario- and western Canada-based visitors compared to 1998. Visitations from U.S. residents living in regions other than New England declined 12% in 1999 over 1998 (Table 5).

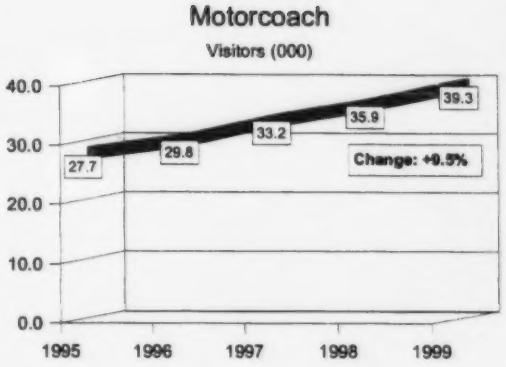


Figure 63

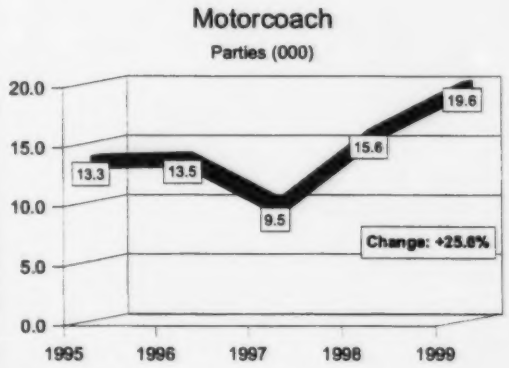


Figure 64

	Motorcoach Key Visitor Origin Markets			
	1999		1998	
	Visitors	% Total	Visitors	% Total
Ontario	3,494	9%	718	2%
Other Cda	1,963	5%	359	1%
N England	8,755	22%	6,816	19%
Mid Atl	2,710	7%	3,946	11%
Other USA	21,594	55%	23,678	66%

Table 5

Motorcoach visitors stayed an average of 1.8 nights in 1999, down from 2.2 nights in 1998. PEI's share of trip nights also declined slightly in 1998 to 16.4% from 17.1% (Fig. 59). This can be partly attributed to downward pressure in the marketplace on tour package prices and the repackaging of tours by tour operators. In the Maritimes, PEI's share of trip nights compared favourably with Nova Scotia (16.4%) and New Brunswick (13.6%).

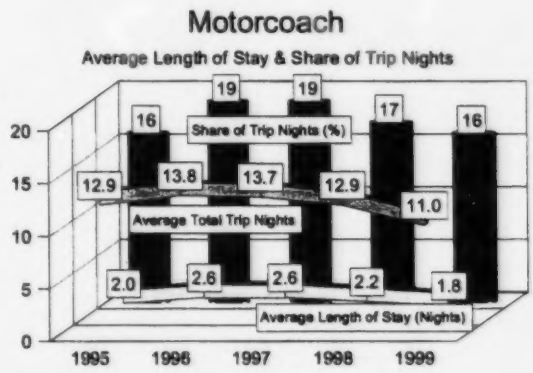


Figure 65

In 1999, motorcoach visitors were motivated to travel primarily by relax and escape (58%) and travelling somewhere they had never travelled before (58%) (Fig. 66). This is supported by the fact that 92% of motorcoach visitors in 1999 were visiting Prince Edward Island for the first time (Table 6).

Several changes in motorcoach visitor demographics were noted in 1999). One of the most notable was a shift in age with an increase in the number of younger motorcoach visitors aged less than 60 (Table 6).

Party make-up is notable as well with an apparent shift away from couples (-6%) and an increase in singles (+3%) and family (+3%) (Table 6).

While visiting PEI, motorcoach visitors continued to experience many of the traditional on-Island activities (Fig. 67). Green Gables house remained the most popular activity (94%), followed by lobster suppers (79%), a Cavendish tour (76%) and a Charlottetown tour (75%). Participation in Cavendish and Charlottetown tours was up 33% and 15% respectively in 1999.

Despite an increase in motorcoach visitations in 1999, overall expenditures were down slightly (Fig. 68). Non-tour expenditures increased to $179 per travel party from $167 in 1998, with meals (42%), craft and souvenir shopping (33%), and other shopping (18%) accounting for the vast majority of expenditures.

At $672 per travel party for PEI's share of tour costs, a notable decline was experienced in 1999 compared to 1998's $883 average. This decline would appear to be directly related to both shorter overall tours and a shorter length of stay in PEI in 1999.

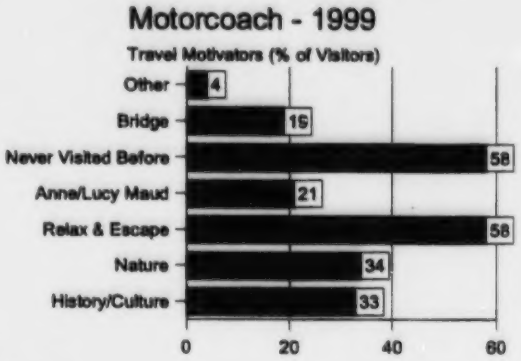


Figure 66

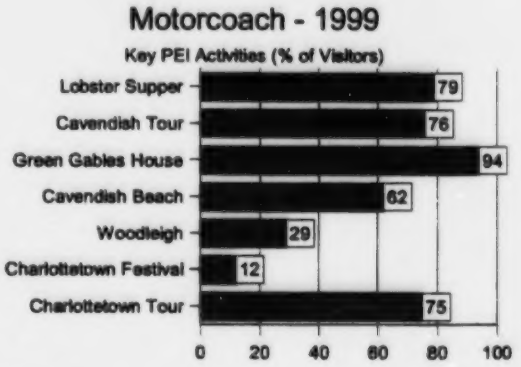


Figure 67

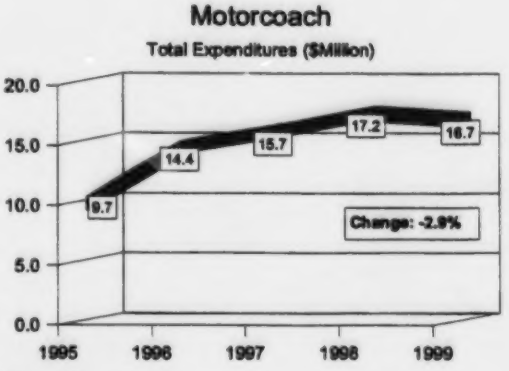


Figure 68

	Motorcoach Visitor Demographics				
	1995	1996	1997	1998	1999
Age					
<40		7%		9%	13%
40 – 59	20%	16%	18%	10%	20%
60+	80%	77%	82%	81%	67%
Employment					
Full-Time	21%	18%	5%	14%	17%
Part-Time	12%	8%	8%	9%	15%
Retired	63%	70%	69%	70%	65%
Other	4%	4%	18%	7%	3%
Trip Status					
First Time	84%	83%	89%	92%	92%
Repeat	16%	17%	11%	8%	8%

Table 6

	Motorcoach Visitor Demographics				
	1995	1996	1997	1998	1999
Age					
<40		7%		9%	13%
40 – 59	20%	16%	18%	10%	20%
60+	80%	77%	82%	81%	67%
Income					
<$50,000	**56%**	**55%**	**64%**	**66%**	**62%**
$50,000+	**44%**	**45%**	**36%**	**34%**	**38%**
Employment					
Full-Time	21%	18%	5%	14%	17%
Part-Time	12%	8%	8%	9%	13%
Retired	63%	70%	69%	70%	63%
Other	4%	4%	18%	7%	8%
Party Make-Up					
Single	**36%**	**44%**	**20%**	**20%**	**23%**
Couple	**63%**	**56%**	**77%**	**79%**	**73%**
Family	**1%**		**3%**	**1%**	**4%**
Avg. Party Size	**2.1**	**2.2**	**3.5**	**2.3**	**1.8**
Trip Status					
First Time	84%	83%	89%	92%	92%
Repeat	16%	17%	11%	8%	8%

Table 6

Japanese

With a flat number of visitors to PEI in 1999 and improving economic conditions in Pacific Rim countries, the downturn in Japanese visitations to PEI shows signs that it may have bottomed out.

It is estimated that 6,297 visitors came to PEI from Japan in 1999, which represents a 1.2% increase over 1998 (Fig. 69). With the average party size being the same in both 1999 and 1998 at 2.4 persons (Fig. 73), the number of Japanese parties visiting PEI increased marginally as well (Fig. 70).

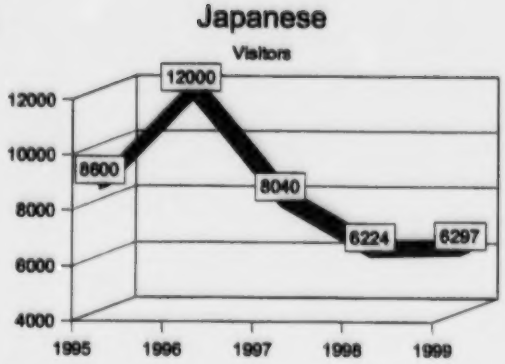


Figure 69

It is notable that while the average length of stay in PEI was comparable between 1999 and 1998 (2.9 nights versus 2.8 nights), the total trip length declined to 6.7 nights in 1999 from 7.4 nights in 1998 (Fig. 74).

Overall, PEI captured a 43% share of trip nights which suggests that while Japanese visitors may be shortening their trip lengths as a cost saving measure, PEI remains a priority destination.

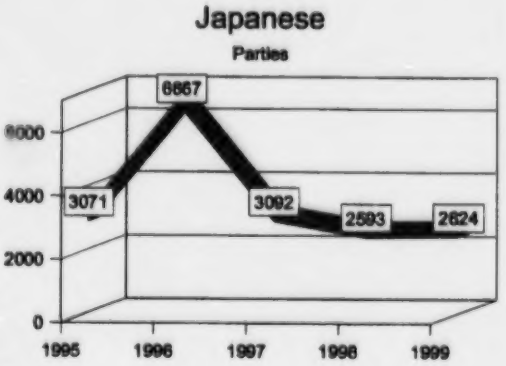


Figure 70

While PEI's share of tour costs in 1999 remained comparable with 1998, a notable decline in non-tour expenditures was experienced (Fig. 71).

With a slight increase in visitations and parties, comparable tour related expenditures, and a decline in non-tour expenditures, the overall impact was flat total expenditures by Japanese visitors between 1998 and 1999 (Fig. 72).

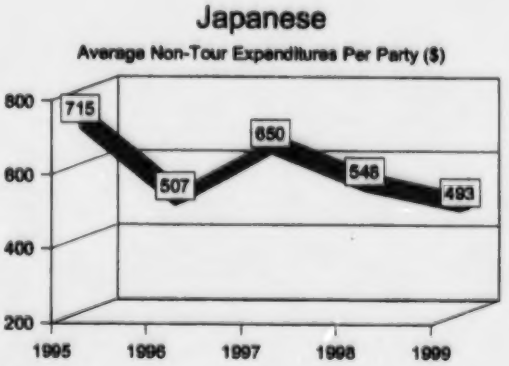
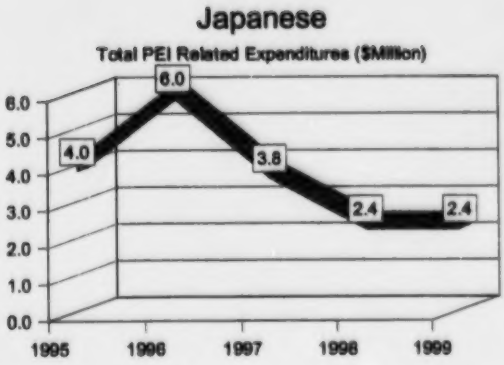


Figure 71



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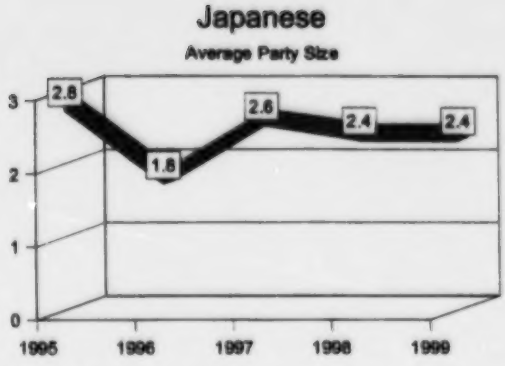

Figure 73

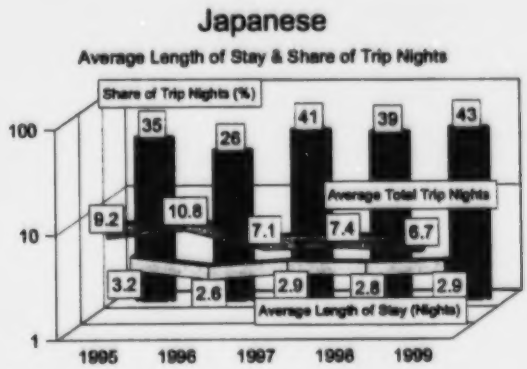

Figure 74

Economic Impact

Tourism 1999

PEI's Tourism Regions

Prince Edward Island
TOURISM

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999 Beaches Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 155 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 8%.

Based upon the 1999 telephone exit survey, it is estimated that 6.3% of all pleasure PMV and air visitors (73,598) to Prince Edward Island between May 15th and October 31st reported the Beaches as their "main overnight destination" (MOD) (**Table 1**). The Beaches' share of "main overnight destination" parties is estimated at 6.3% or 24,128.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
47.8	37.1	59.5	57.0	73.6

Table 1

Table 2 below summarizes visitations to the Beaches in 1999 by visitor origin region. Visitations to the Beaches closely follow the pattern of visitations to PEI as a whole.

	Visitor Origin (% Visitors)	
	Beaches	PEI
Newfoundland	3%	3%
Nova Scotia	25%	21%
New Brunswick	10%	10%
Quebec	8%	9%
Ontario	23%	28%
Other Canada	6%	7%
New England	7%	8%
Mid Atlantic	6%	4%
Other USA	10%	10%
International	3%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming the Beaches as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	3%
Family vacation	25%
Golf	2%
History and culture	6%
Nature	6%
Relax and escape	18%
Sports	
Festival/event	3%
Anne/Lucy Maude	4%
Visit friends and relatives	12%
Just to see PEI	10%
Other	11%

Table 3

While overnighting, visitors reporting the Beaches as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	5%
Cabin/Cottage	32%
Campground	21%
Hotel/Motel	26%
Non-Paid	14%
Other	2%

Table 4

In 1999, the reported average length of stay was 5.4 nights (**Table 5**), representing a 52% share of total trip nights.

Average Length of Stay (Nights)				
1995	**1996**	**1997**	**1998**	**1999**
6.7	5.5	5.5	6.0	5.4

Table 5

For visitors reporting the Beaches as their MOD, the decision to come was more than 12 weeks for over 40% of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	2%
<4 weeks	13%
4 - 6 weeks	14%
7 - 8 weeks	8%
9 - 12 weeks	16%
>12 weeks	43%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696. For visitors reporting the Beaches as their MOD, the average party expenditure is estimated at $682.00. (**Table 7**).

Average Party Expenditure ($)				
1995	**1996**	**1997**	**1998**	**1999**
$710	$731	$724	$835	$682

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	**1998**	**1999**
Accommodations	28%	31%	32%
Restaurant/take-out meals	30%	24%	22%
Groceries/Liquor	8%	8%	10%
Admissions	8%	7%	9%
Crafts/souvenirs	9%	11%	11%
Automobile	10%	9%	10%
Other	7%	10%	6%

Table 8

Table 9: Visitor Demographics					
	1995	**1996**	**1997**	**1998**	**1999**
Age (% Visitors)					
<40	35%	28%	31%	30%	34%
40+	65%	72%	69%	70%	66%
Income (% Parties)					
<$50,000	38%	41%	32%	29%	40%
$50,000+	62%	59%	68%	71%	60%
Employment (% Visitors)					
Full-time	64%	59%	68%	67%	56%
Part-time	6%	10%	13%	10%	7%
Retired	26%	26%	12%	19%	19%
Other	4%	5%	7%	4%	18%
Party Make-Up (% Parties)					
Singles	11%	5%	4%	3%	5%
Couples	61%	81%	54%	56%	51%
Families	28%	14%	42%	41%	44%
Average party size	2.9	2.5	3.5	3.5	3.1
Trip Status (% Visitors)					
First time	42%	51%	46%	47%	43%
Repeat	58%	49%	54%	53%	57%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999 Cavendish Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 677 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 4%.

Based upon the 1999 telephone exit survey, it is estimated that 27.5% of all pleasure PMV and air visitors (321,261) to Prince Edward Island between May 15th and October 31st reported Cavendish as their "main overnight destination" (MOD) (**Table 1**). Cavendish's share of "main overnight destination" parties is estimated at 27.1% or 103,789 parties.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
150.3	148.2	285.3	319.4	321.3

Table 1

Table 2 below summarizes visitations to Cavendish in 1999 by visitor origin region. Cavendish attracted slightly more visitors from New Brunswick and Quebec and fewer from Ontario than visitations to PEI as a whole.

	Visitor Origin (% Visitors)	
	Cavendish	PEI
Newfoundland	5%	3%
Nova Scotia	21%	21%
New Brunswick	14%	10%
Quebec	12%	9%
Ontario	21%	26%
Other Canada	6%	7%
New England	7%	8%
Mid Atlantic	4%	4%
Other USA	8%	10%
International	2%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Cavendish as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	8%
Family vacation	35%
Golf	4%
History and culture	7%
Nature	5%
Relax and escape	15%
Sports	
Festival/event	
Anne/Lucy Maude	6%
Visit friends and relatives	4%
Just to see PEI	8%
Other	8%

Table 3

While overnighting, visitors reporting Cavendish as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	9%
Cabin/Cottage	32%
Campground	33%
Hotel/Motel	22%
Non-Paid	3%
Other	1%

Table 4

In 1999, the reported average length of stay was 4.1 nights (**Table 5**), representing a 40% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
4.1	3.9	4.3	4.2	4.1

Table 5

For visitors reporting Cavendish as their MOD, the decision to come was more than 12 weeks for nearly one half (46%) of visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	3%
<4 weeks	14%
4 - 6 weeks	17%
7 - 8 weeks	10%
9 - 12 weeks	9%
>12 weeks	46%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696. For visitors reporting Cavendish as their MOD, the average party expenditure is estimated at $770.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$593	$548	$682	$714	$770

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	33%	30%	32%
Restaurant/take-out meals	27%	24%	23%
Groceries/Liquor	8%	7%	9%
Admissions	9%	9%	10%
Crafts/souvenirs	11%	13%	9%
Automobile	7%	9%	9%
Other	5%	8%	8%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	38%	30%	33%	38%	39%
40+	62%	70%	67%	62%	61%
Income (% Parties)					
<$50,000	46%	43%	40%	35%	41%
$50,000+	54%	57%	60%	65%	59%
Employment (% Visitors)					
Full-time	63%	53%	65%	66%	59%
Part-time	9%	6%	8%	10%	10%
Retired	19%	33%	17%	21%	20%
Other	9%	8%	10%	3%	11%
Party Make-Up (% Parties)					
Singles	2%	3%	3%	1%	1%
Couples	60%	76%	49%	51%	58%
Families	38%	21%	48%	48%	41%
Average party size	3.3	2.8	3.3	3.5	3.5
Trip Status (% Visitors)					
First time	45%	52%	55%	54%	45%
Repeat	55%	48%	45%	46%	55%

Economic Impact: Tourism 1999
Charlottetown Tourism Region
Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 755 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 4%.

Based upon the 1999 telephone exit survey, it is estimated that 29.3% of all pleasure PMV and air visitors (342,289) to Prince Edward Island between May 15th and October 31st reported Charlottetown as their "main overnight destination" (MOD) (**Table 1**). Charlottetown's share of "main overnight destination" parties is estimated at 29.6% or 113,364 parties.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
218.6	259.3	344.8	353.6	342.3

Table 1

Table 2 below summarizes visitations to Charlottetown in 1999 by visitor origin region. Charlottetown attracted slightly more visitors from Other USA and marginally fewer from the Maritimes and Quebec than PEI as a whole.

	Visitor Origin (% Visitors)	
	Charlottetown	PEI
Newfoundland	2%	3%
Nova Scotia	19%	21%
New Brunswick	9%	10%
Quebec	6%	9%
Ontario	26%	26%
Other Canada	9%	7%
New England	6%	8%
Mid Atlantic	6%	4%
Other USA	13%	10%
International	3%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Charlottetown as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	6%
Family vacation	18%
Golf	2%
History and culture	11%
Nature	4%
Relax and escape	11%
Sports	2%
Festival/event	1%
Anne/Lucy Maude	4%
Visit friends and relatives	19%
Just to see PEI	12%
Other	10%

Table 3

While overnighting, visitors reporting Charlottetown as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	14%
Cabin/Cottage	4%
Campground	5%
Hotel/Motel	56%
Non-Paid	19%
Other	2%

Table 4

In 1999, the reported average length of stay was 4.1 nights (**Table 5**), representing a 39% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
3.8	3.4	4.0	3.6	4.1

Table 5

For visitors reporting Charlottetown as their MOD, the decision to come was more than 12 weeks for nearly one half (44%) of visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	4%
<4 weeks	14%
4 - 6 weeks	19%
7 - 8 weeks	9%
9 - 12 weeks	10%
>12 weeks	44%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696. For those visitors reporting Charlottetown as their MOD, the average party expenditure is estimated at $643.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$452	$434	$620	$595	$643

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	29%	33%	33%
Restaurant/take-out meals	33%	27%	24%
Groceries/Liquor	4%	4%	5%
Admissions	6%	7%	7%
Crafts/souvenirs	13%	12%	11%
Automobile	9%	9%	10%
Other	6%	8%	10%

Table 8

Table 9: Visitor Demographics

	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	44%	37%	24%	25%	25%
40+	56%	63%	76%	75%	75%
Income (% Parties)					
<$50,000	47%	43%	35%	28%	40%
$50,000+	53%	57%	65%	72%	60%
Employment (% Visitors)					
Full-time	49%	40%	55%	56%	52%
Part-time	7%	10%	8%	9%	9%
Retired	36%	43%	28%	26%	28%
Other	8%	7%	9%	9%	11%
Party Make-Up (% Parties)					
Singles	11%	14%	6%	4%	8%
Couples	75%	80%	73%	62%	72%
Families	14%	6%	21%	34%	20%
Average party size	2.4	2.9	3.0	2.8	2.7
Trip Status (% Visitors)					
First time	49%	59%	54%	64%	49%
Repeat	51%	41%	46%	36%	51%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999 Eastern Kings Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 100 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 10%.

Based upon the 1999 telephone exit survey, it is estimated that 4.1% of all pleasure PMV and air visitors (47,897) to Prince Edward Island between May 15th and October 31st reported Eastern Kings as their "main overnight destination" (MOD) (**Table 1**). Eastern Kings's share of "main overnight destination" parties is estimated at 4.1% or 15,702 parties.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
34.2	29.6	35.7	45.6	47.9

Table 1

Table 2 below summarizes visitations to Eastern Kings in 1999 by visitor origin region. Eastern Kings attracted slightly more visitors from Nova Scotia, Quebec and New England and marginally fewer from Other Canada and Other USA than PEI as a whole.

	Visitor Origin (% Visitors)	
	Eastern Kings	PEI
Newfoundland	1%	3%
Nova Scotia	27%	21%
New Brunswick	2%	10%
Quebec	13%	9%
Ontario	26%	26%
Other Canada	3%	7%
New England	15%	8%
Mid Atlantic	4%	4%
Other USA	5%	10%
International	6%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Eastern Kings as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	1%
Family vacation	23%
Golf	5%
History and culture	4%
Nature	2%
Relax and escape	18%
Sports	4%
Festival/event	1%
Anne/Lucy Maude	1%
Visit friends and relatives	22%
Just to see PEI	3%
Other	16%

Table 3

While overnighting, visitors reporting Eastern Kings as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	10%
Cabin/Cottage	26%
Campground	15%
Hotel/Motel	14%
Non-Paid	28%
Other	7%

Table 4

In 1999, the reported average length of stay was 6.3 nights (**Table 5**), representing a 56% share of total trip nights.

Average Length of Stay (Nights)				
1995	**1996**	**1997**	**1998**	**1999**
5.7	5.8	5.3	6.5	6.3

Table 5

For visitors reporting Eastern Kings as their MOD, the decision to come was more than 12 weeks for nearly one half (49%) of visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	2%
<4 weeks	17%
4 - 6 weeks	14%
7 - 8 weeks	9%
9 - 12 weeks	9%
>12 weeks	49%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696. For those visitors reporting Eastern Kings as their MOD, the average party expenditure is estimated at $774.00. (**Table 7**).

Average Party Expenditure ($)				
1995	**1996**	**1997**	**1998**	**1999**
$687	$463	$560	$645	$774

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	**1998**	**1999**
Accommodations	27%	27%	28%
Restaurant/take-out meals	29%	22%	22%
Groceries/Liquor	10%	12%	10%
Admissions	7%	7%	4%
Crafts/souvenirs	10%	10%	9%
Automobile	9%	6%	13%
Other	8%	16%	14%

Table 8

	Table 9: Visitor Demographics				
	1995	**1996**	**1997**	**1998**	**1999**
Age (% Visitors)					
<40	25%	26%	32%	23%	34%
40+	75%	74%	68%	77%	66%
Income (% Parties)					
<$50,000	38%	40%	35%	35%	37%
$50,000+	62%	60%	65%	65%	63%
Employment (% Visitors)					
Full-time	55%	56%	68%	67%	60%
Part-time	7%	9%	7%	9%	8%
Retired	28%	27%	16%	18%	24%
Other	10%	8%	9%	6%	8%
Party Make-Up (% Parties)					
Singles	14%	9%	4%	12%	11%
Couples	58%	74%	62%	49%	54%
Families	28%	17%	34%	39%	35%
Average party size	2.5	2.1	2.7	3.1	3.0
Trip Status (% Visitors)					
First time	33%	32%	45%	37%	35%
Repeat	67%	68%	55%	63%	65%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999 Evangeline Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 27 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 19%.

Based upon the 1999 telephone exit survey, it is estimated that 1.1% of all pleasure PMV and air visitors (12,850) to Prince Edward Island between May 15th and October 31st reported Evangeline as their "main overnight destination" (MOD) (**Table 1**). Evangeline's share of "main overnight destination" parties is estimated at 1.1% or 4,213.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
13.7	14.8	23.8	22.8	12.8

Table 1

Table 2 below summarizes visitations to Evangeline in 1999 by visitor origin region. It is noteable that Evangeline attracted a higher proportion of visitors from Other Canada and New Brunswick than PEI as a whole.

	Visitor Origin (% Visitors)	
	Evangeline	PEI
Newfoundland		3%
Nova Scotia	7%	21%
New Brunswick	18%	10%
Quebec	15%	9%
Ontario	26%	26%
Other Canada	15%	7%
New England	4%	8%
Mid Atlantic		4%
Other USA	15%	10%
International		3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Evangeline as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	4%
Family vacation	7%
Golf	
History and culture	11%
Nature	4%
Relax and escape	7%
Sports	
Festival/event	
Anne/Lucy Maude	
Visit friends and relatives	48%
Just to see PEI	15%
Other	4%

Table 3

While overnighting, visitors reporting Evangeline as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	4%
Cabin/Cottage	25%
Campground	7%
Hotel/Motel	25%
Non-Paid	36%
Other	3%

Table 4

In 1999, the reported average length of stay was 7.0 nights (**Table 5**), representing a 63% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
13.7	14.8	23.8	22.8	7.0

Table 5

For visitors reporting Evangeline as their MOD, the decision to come was more than 12 weeks for almost half of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	15%
<4 weeks	8%
4 - 6 weeks	15%
7 - 8 weeks	4%
9 - 12 weeks	19%
>12 weeks	39%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696.00. For those visitors reporting Evangeline as their MOD, the average party expenditure is estimated at $782.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$479	$597	$535	$592	$782

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	26%	21%	20%
Restaurant/take-out meals	35%	23%	19%
Groceries/Liquor	5%	8%	17%
Admissions	9%	10%	6%
Crafts/souvenirs	9%	14%	6%
Automobile	9%	11%	20%
Other	7%	13%	12%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	31%	52%	20%	29%	40%
40+	69%	48%	80%	71%	60%
Income (% Parties)					
<$50,000	64%	53%	20%	53%	30%
$50,000+	36%	47%	80%	47%	70%
Employment (% Visitors)					
Full-time	37%	443%	59%	57%	67%
Part-time	0%	8%	5%	14%	4%
Retired	46%	31%	27%	24%	15%
Other	17%	17%	9%	5%	14%
Party Make-Up (% Parties)					
Singles	9%	18%	9%	5%	11%
Couples	74%	76%	69%	52%	57%
Families	17%	6%	22%	43%	32%
Average party size	2.5	2.1	2.6	2.9	2.7
Trip Status (% Visitors)					
First time	23%	38%	59%	33%	37%
Repeat	77%	62%	41%	67%	63%

Economic Impact: Tourism 1999
Kensington Tourism Region
Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 74 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 11%.

Based upon the 1999 telephone exit survey, it is estimated that 3.3% of all pleasure PMV and air visitors (38,551) to Prince Edward Island between May 15th and October 31st reported Kensington as their "main overnight destination" (MOD) (**Table 1**). Kensington's share of "main overnight destination" parties is estimated at 3.3% or 12,639.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
27.3	22.2	35.7	45.6	38.5

Table 1

Table 2 below summarizes visitations to Kensington in 1999 by visitor origin region. It is noteable that Kensington attracted a higher proportion of visitors from Ontario and New Brunswick than PEI as a whole.

	Visitor Origin (% Visitors)	
	Kensington	PEI
Newfoundland	4%	3%
Nova Scotia	15%	21%
New Brunswick	21%	10%
Quebec	4%	9%
Ontario	29%	26%
Other Canada	7%	7%
New England	6%	8%
Mid Atlantic	2%	4%
Other USA	8%	10%
International	4%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Kensington as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	7%
Family vacation	35%
Golf	
History and culture	6%
Nature	4%
Relax and escape	8%
Sports	1%
Festival/event	
Anne/Lucy Maude	6%
Visit friends and relatives	17%
Just to see PEI	7%
Other	9%

Table 3

While overnighting, visitors reporting Kensington as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	11%
Cabin/Cottage	30%
Campground	31%
Hotel/Motel	7%
Non-Paid	16%
Other	5%

Table 4

In 1999, the reported average length of stay was 4.8 nights (**Table 5**), representing a 49% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
5.5	6.8	6.3	5.3	4.8

Table 5

For visitors reporting Kensington as their MOD, the decision to come was more than 12 weeks for almost half of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	3%
<4 weeks	9%
4 - 6 weeks	18%
7 - 8 weeks	4%
9 - 12 weeks	25%
>12 weeks	42%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696.00. For those visitors reporting Kensington as their MOD, the average party expenditure is estimated at $685.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$516	$588	$705	$645	$685

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	25%	26%	29%
Restaurant/take-out meals	25%	25%	22%
Groceries/Liquor	11%	10%	10%
Admissions	9%	7%	11%
Crafts/souvenirs	15%	12%	11%
Automobile	10%	10%	10%
Other	5%	10%	7%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	28%	33%	33%	26%	40%
40+	72%	67%	67%	74%	60%
Income (% Parties)					
<$50,000	45%	39%	51%	33%	41%
$50,000+	55%	61%	49%	67%	59%
Employment (% Visitors)					
Full-time	56%	53%	53%	47%	65%
Part-time	8%	10%	10%	10%	7%
Retired	31%	26%	25%	31%	22%
Other	5%	11%	12%	12%	6%
Party Make-Up (% Parties)					
Singles	7%	12%	5%	7%	6%
Couples	62%	72%	58%	52%	51%
Families	31%	16%	37%	41%	43%
Average party size	2.7	2.4	3.4	3.4	3.5
Trip Status (% Visitors)					
First time	33%	36%	37%	41%	32%
Repeat	73%	64%	63%	59%	68%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999
New London Tourism Region
Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 19 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 22%.

Based upon the 1999 telephone exit survey, it is estimated that .9% of all pleasure PMV and air visitors (10,314) to Prince Edward Island between May 15th and October 31st reported New London as their "main overnight destination" (MOD) (**Table 1**). New London's share of "main overnight destination" parties is estimated at .9% or 3,447.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
6.8	14.8	23.8	22.8	10.3

Table 1

Table 2 below summarizes visitations to New London in 1999 by visitor origin region. It is noteable that New London attracted a higher proportion of visitors from Ontario and Nova Scotia than PEI as a whole.

	Visitor Origin (% Visitors)	
	New London	PEI
Newfoundland	0%	3%
Nova Scotia	24%	21%
New Brunswick	14%	10%
Quebec	5%	9%
Ontario	33%	26%
Other Canada	5%	7%
New England	14%	8%
Mid Atlantic	5%	4%
Other USA	0%	10%
International	0%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming New London as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	
Family vacation	38%
Golf	10%
History and culture	14%
Nature	
Relax and escape	14%
Sports	
Festival/event	
Anne/Lucy Maude	10%
Visit friends and relatives	10%
Just to see PEI	
Other	4%

Table 3

While overnighting, visitors reporting New London as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	10%
Cabin/Cottage	48%
Campground	
Hotel/Motel	28%
Non-Paid	14%
Other	0%

Table 4

In 1999, the reported average length of stay was 5.3 nights (**Table 5**), representing a 61% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
5	4.3	6.2	7.5	5.3

Table 5

For visitors reporting New London as their MOD, the decision to come was more than 12 weeks for more than half of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	4%
<4 weeks	13%
4 - 6 weeks	17%
7 - 8 weeks	4%
9 - 12 weeks	4%
>12 weeks	52%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696.00. For those visitors reporting New London as their MOD, the average party expenditure is estimated at $1,264.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$409	$577	$536	$592	$1,264

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	20%	30%	26%
Restaurant/take-out meals	29%	33%	25%
Groceries/Liquor	6%	10%	14%
Admissions	5%	5%	7%
Crafts/souvenirs	12%	7%	8%
Automobile	8%	7%	14%
Other	20%	8%	6%

Table 8

	Table 9: Visitor Demographics				
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	23%	23%	33%	26%	29%
40+	77%	77%	67%	74%	71%
Income (% Parties)					
<$50,000	40%	21%	41%	34%	25%
$50,000+	60%	79%	59%	66%	75%
Employment (% Visitors)					
Full-time	56%	53%	47%	65%	68%
Part-time	8%	10%	26%	15%	9%
Retired	31%	26%	21%	20%	14%
Other	5%	11%	6%	6%	9%
Party Make-Up (% Parties)					
Singles	15%	4%	16%	5%	0%
Couples	77%	73%	53%	55%	48%
Families	8%	23%	31%	40%	52%
Average party size	2.2	2.7	2.6	2.8	3.8
Trip Status (% Visitors)					
First time	38%	43%	42%	40%	27%
Repeat	62%	57%	58%	60%	73%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999
Southern Kings Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 136 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 8%.

Based upon the 1999 telephone exit survey, it is estimated that 6.1% of all pleasure PMV and air visitors (71,261) to Prince Edward Island between May 15th and October 31st reported Southern Kings as their "main overnight destination" (MOD) (**Table 1**). Southern Kings's share of "main overnight destination" parties is estimated at 6.1% or 23,362.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
41.0	25.2	47.6	57.0	71.3

Table 1

Table 2 below summarizes visitations to Southern Kings in 1999 by visitor origin region. It is noteable that Southern Kings attracted a higher proportion of visitors from Ontario and Nova Scotia than PEI as a whole.

	Visitor Origin (% Visitors)	
	Southern Kings	PEI
Newfoundland	3%	3%
Nova Scotia	27%	21%
New Brunswick	4%	10%
Quebec	7%	9%
Ontario	33%	26%
Other Canada	5%	7%
New England	7%	8%
Mid Atlantic	4%	4%
Other USA	8%	10%
International	2%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Southern Kings as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	8%
Family vacation	26%
Golf	13%
History and culture	4%
Nature	3%
Relax and escape	13%
Sports	
Festival/event	
Anne/Lucy Maude	1%
Visit friends and relatives	21%
Just to see PEI	4%
Other	7%

Table 3

While overnighting, visitors reporting Southern Kings as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	7%
Cabin/Cottage	27%
Campground	7%
Hotel/Motel	27%
Non-Paid	32%
Other	0%

Table 4

In 1999, the reported average length of stay was 5.4 nights (**Table 5**), representing a 55% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
6.3	5.4	5	4.5	5.4

Table 5

For visitors reporting Southern Kings as their MOD, the decision to come was more than 12 weeks for almost half of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	1%
<4 weeks	9%
4 - 6 weeks	21%
7 - 8 weeks	15%
9 - 12 weeks	6%
>12 weeks	48%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696.00. For those visitors reporting Southern Kings as their MOD, the average party expenditure is estimated at $688.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$495	$543	$576	$596	$688

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	27%	26%	27%
Restaurant/take-out meals	31%	27%	21%
Groceries/Liquor	10%	8%	12%
Admissions	4%	5%	7%
Crafts/souvenirs	11%	11%	8%
Automobile	10%	12%	14%
Other	7%	11%	11%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	26%	11%	28%	27%	29%
40+	74%	89%	72%	73%	71%
Income (% Parties)					
<$50,000	54%	43%	40%	28%	35%
$50,000+	46%	57%	60%	72%	65%
Employment (% Visitors)					
Full-time	61%	44%	57%	60%	55%
Part-time	6%	6%	9%	8%	11%
Retired	22%	46%	27%	27%	18%
Other	11%	4%	7%	5%	16%
Party Make-Up (% Parties)					
Singles	9%	9%	9%	7%	8%
Couples	68%	84%	63%	60%	59%
Families	23%	7%	28%	30%	33%
Average party size	2.7	2.2	2.8	3.1	3.1
Trip Status (% Visitors)					
First time	24%	43%	39%	35%	36%
Repeat	76%	57%	61%	65%	64%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999 South Shore Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 110 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 9%.

Based upon the 1999 telephone exit survey, it is estimated that 4.6% of all pleasure PMV and air visitors (53,738) to Prince Edward Island between May 15th and October 31st reported South Shore as their "main overnight destination" (MOD) (**Table 1**). South Shore's share of "main overnight destination" parties is estimated at 4.6% or 17,617.

Pleasure PMV & Air Visitors (000)				
1995	**1996**	**1997**	**1998**	**1999**
27.3	14.8	47.6	57	53.7

Table 1

Table 2 below summarizes visitations to South Shore in 1999 by visitor origin region. It is noteable that South Shore attracted a slightly higher proportion of visitors from Ontario and Other USA than PEI as a whole.

	Visitor Origin (% Visitors)	
	South Shore	**PEI**
Newfoundland	3%	3%
Nova Scotia	21%	21%
New Brunswick	9%	10%
Quebec	3%	9%
Ontario	29%	26%
Other Canada	8%	7%
New England	9%	8%
Mid Atlantic	3%	4%
Other USA	12%	10%
International	3%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming South Shore as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	6%
Family vacation	22%
Golf	
History and culture	5%
Nature	2%
Relax and escape	19%
Sports	
Festival/event	
Anne/Lucy Maude	1%
Visit friends and relatives	28%
Just to see PEI	11%
Other	6%

Table 3

While overnighting, visitors reporting South Shore as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	10%
Cabin/Cottage	17%
Campground	12%
Hotel/Motel	24%
Non-Paid	35%
Other	2%

Table 4

In 1999, the reported average length of stay was 5.5 nights (**Table 5**), representing a 48% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
5	4.6	6.1	5.6	5.5

Table 5

For visitors reporting South Shore as their MOD, the decision to come was more than 12 weeks for almost half of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	4%
<4 weeks	18%
4 - 6 weeks	5%
7 - 8 weeks	8%
9 - 12 weeks	17%
>12 weeks	48%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696.00. For those visitors reporting South Shore as their MOD, the average party expenditure is estimated at $666.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$484	$577	$700	$596	$666

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	25%	23%	25%
Restaurant/take-out meals	28%	25%	24%
Groceries/Liquor	11%	8%	11%
Admissions	7%	7%	9%
Crafts/souvenirs	14%	14%	11%
Automobile	10%	10%	13%
Other	5%	13%	7%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	31%	34%	25%	19%	31%
40+	69%	64%	75%	81%	69%
Income (% Parties)					
<$50,000	42%	48%	39%	56%	35%
$50,000+	58%	52%	61%	44%	65%
Employment (% Visitors)					
Full-time	53%	59%	54%	48%	44%
Part-time	6%	2%	11%	7%	13%
Retired	28%	25%	28%	34%	28%
Other	13%	14%	7%	11%	15%
Party Make-Up (% Parties)					
Singles	9%	19%	8%	4%	4%
Couples	70%	64%	54%	57%	61%
Families	21%	17%	38%	39%	35%
Average party size	3.1	2.4	3.3	2.9	3.2
Trip Status (% Visitors)					
First time	24%	43%	39%	35%	42%
Repeat	76%	57%	61%	65%	58%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999 Summerside Tourism Region

Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 193 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 7%.

Based upon the 1999 telephone exit survey, it is estimated that 8.5% of all pleasure PMV and air visitors (99,299) to Prince Edward Island between May 15th and October 31st reported Summerside as their "main overnight destination" (MOD) (**Table 1**). Summerside's share of "main overnight destination" parties is estimated at 8.5% or 32,554.

Pleasure PMV & Air Visitors (000)				
1995	**1996**	**1997**	**1998**	**1999**
75.2	111.2	130.8	114.1	99.3

Table 1

Table 2 below summarizes visitations to Summerside in 1999 by visitor origin region. It is noteable that Summerside attracted a slightly higher proportion of visitors from Ontario and Nova Scotia than PEI as a whole.

	Visitor Origin (% Visitors)	
	Summerside	**PEI**
Newfoundland	2%	3%
Nova Scotia	26%	21%
New Brunswick	9%	10%
Quebec	8%	9%
Ontario	28%	26%
Other Canada	9%	7%
New England	8%	8%
Mid Atlantic	3%	4%
Other USA	6%	10%
International	1%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming Summerside as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	13%
Family vacation	20%
Golf	
History and culture	6%
Nature	5%
Relax and escape	14%
Sports	2%
Festival/event	
Anne/Lucy Maude	1%
Visit friends and relatives	21%
Just to see PEI	5%
Other	13%

Table 3

While overnighting, visitors reporting Summerside as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	10%
Cabin/Cottage	5%
Campground	9%
Hotel/Motel	55%
Non-Paid	21%
Other	0%

Table 4

In 1999, the reported average length of stay was 4.6 nights (**Table 5**), representing a 43% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
4.4	3.9	4.4	4.4	4.6

Table 5

For visitors reporting Summerside as their MOD, the decision to come was more than 12 weeks for one third of the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	5%
<4 weeks	18%
4 - 6 weeks	23%
7 - 8 weeks	9%
9 - 12 weeks	11%
>12 weeks	34%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696.00. For those visitors reporting Summerside as their MOD, the average party expenditure is estimated at $669.00. (**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$397	$425	$603	$620	$669

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	29%	30%	33%
Restaurant/take-out meals	32%	25%	25%
Groceries/Liquor	5%	5%	7%
Admissions	7%	8%	6%
Crafts/souvenirs	13%	11%	11%
Automobile	8%	11%	11%
Other	6%	10%	7%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	29%	29%	24%	18%	25%
40+	71%	71%	76%	82%	75%
Income (% Parties)					
<$50,000	50%	46%	47%	42%	40%
$50,000+	50%	54%	53%	58%	60%
Employment (% Visitors)					
Full-time	58%	50%	60%	56%	52%
Part-time	6%	7%	9%	6%	4%
Retired	28%	35%	25%	34%	32%
Other	8%	8%	6%	4%	12%
Party Make-Up (% Parties)					
Singles	13%	12%	7%	4%	4%
Couples	71%	79%	69%	61%	77%
Families	16%	9%	24%	35%	19%
Average party size	2.4	2.5	2.9	3.1	2.8
Trip Status (% Visitors)					
First time	49%	59%	52%	51%	38%
Repeat	51%	41%	48%	49%	62%

Prince Edward Island
TOURISM

Economic Impact: Tourism 1999
West Prince Tourism Region
Pleasure Private Motor Vehicle and Air Visitors

Visitor and economic impact information in this document is based on 77 responses from the 1999 Tourism PEI telephone exit survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of ± 11%.

Based upon the 1999 telephone exit survey, it is estimated that 3.3% of all pleasure PMV and air visitors (38,551) to Prince Edward Island between May 15th and October 31st reported West Prince as their "main overnight destination" (MOD) (**Table 1**). West Prince's share of "main overnight destination" parties is estimated at 3.4% or 13,052.

Pleasure PMV & Air Visitors (000)				
1995	1996	1997	1998	1999
34.2	31.1	59.5	45.6	38.6

Table 1

Table 2 below summarizes visitations to West Prince in 1999 by visitor origin region. It is notable that West Prince attracted a significantly higher proportion of visitors from Ontario than PEI as a whole, while visitations from Nova Scotia were significantly lower.

	Visitor Origin (% Visitors)	
	West Prince	PEI
Newfoundland	3%	3%
Nova Scotia	6%	21%
New Brunswick	11%	10%
Quebec	5%	9%
Ontario	46%	26%
Other Canada	5%	7%
New England	11%	8%
Mid Atlantic	5%	4%
Other USA	5%	10%
International	4%	3%

Table 2

Table 3 summarizes the main travel motivator for visitors claiming West Prince as their MOD in 1999.

Main Travel Motivator (% Visitors)	
Confederation Bridge	1%
Family vacation	24%
Golf	5%
History and culture	4%
Nature	5%
Relax and escape	15%
Sports	
Festival/event	
Anne/Lucy Maude	
Visit friends and relatives	24%
Just to see PEI	10%
Other	12%

Table 3

While overnighting, visitors reporting West Prince as their MOD stayed in the following accommodations (**Table 4**).

Accommodations (% Visitors)	
B&B/Inn	14%
Cabin/Cottage	17%
Campground	14%
Hotel/Motel	21%
Non-Paid	32%
Other	2%

Table 4

In 1999, the reported average length of stay was 7.3 nights (**Table 5**), representing a 58% share of total trip nights.

Average Length of Stay (Nights)				
1995	1996	1997	1998	1999
7.3	7.3	5.1	6.6	7.3

Table 5

For visitors reporting West Prince as their MOD, the decision to come was more than 12 weeks for almost half the visitors (**Table 6**).

Decision to Come (% Visitors)	
While visiting NS/NB	4%
<4 weeks	1%
4 - 6 weeks	15%
7 - 8 weeks	23%
9 - 12 weeks	9%
>12 weeks	48%

Table 6

For all 1999 pleasure PMV and air visitors to PEI, average party expenditure is estimated at $696. For those visitors reporting West Prince as their MOD, the average party expenditure is estimated at $699(**Table 7**).

Average Party Expenditure ($)				
1995	1996	1997	1998	1999
$657	$518	$630	$692	$699

Table 7

Among these parties, estimated expenditures by expenditure category are summarized in **Table 8** below.

Party Expenditures			
	1997	1998	1999
Accommodations	25%	23%	22%
Restaurant/take-out meals	27%	26%	25%
Groceries/Liquor	11%	9%	9%
Admissions	7%	7%	7%
Crafts/souvenirs	13%	13%	11%
Automobile	9%	12%	12%
Other	8%	10%	14%

Table 8

Table 9: Visitor Demographics					
	1995	1996	1997	1998	1999
Age (% Visitors)					
<40	25%	32%	27%	18%	23%
40+	75%	68%	73%	82%	77%
Income (% Parties)					
<$50,000	50%	64%	41%	50%	35%
$50,000+	50%	36%	59%	50%	65%
Employment (% Visitors)					
Full-time	56%	55%	58%	56%	53%
Part-time	69%	8%	9%	4%	8%
Retired	27%	28%	21%	30%	29%
Other	11%	9%	12%	10%	10%
Party Make-Up (% Parties)					
Singles	15%	15%	5%	6%	9%
Couples	69%	71%	61%	63%	61%
Families	16%	14%	34%	31%	30%
Average party size	2.5	2.9	3.0	2.9	2.8
Trip Status (% Visitors)					
First time	45%	52%	38%	39%	36%
Repeat	55%	48%	62%	61%	64%